

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0241 - GUIDE TO ESRBI WORKFORCE PROFILE DASHBOARD

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# DOCUMENT CONTROL

## CHANGE RECORD

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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 Profile Dashboard

### *Description*

This dashboard is designed to provide the user with intelligence around the profile of an organisation's workforce (it is only available at an organisation level).

This includes:

- Equality and Diversity
- Retirements
- Fixed Term Contracts
- Working Time Regulation

### *Allocation*

This dashboard is available to the following URPs:

XXX BI Administration

XXX Finance Administration (Please see access restrictions below)

XXX HR Administration

XXX HR Administration (With RA)

XXX HR Management

XXX Payroll Administration (Please see access restrictions below)

XXX Payroll Super Administration (Please see access restrictions below)

XXX Occupational Health Administration (Please see access restrictions below)

**Please note** that Payroll Administration and Payroll Super Administration URPs only have access to the following pages within the Workforce Profile Dashboard:

- Retirements Due
- Fixed Term Contracts
- Overseas Employees
- Rehires
- Online ESR Access
- WTR Summary
- WTR Detail

Finance Administration URP only has access to the following page:

- Job Plan Reconciliation

Occupational Health Administration URP only has access to the following pages:

- Flu Vaccinations (Summary & Detail)
- Covid-19 Vaccinations (Summary & Detail)

### *Prompts*

Organisation(s)

Exclude Organisation(s)

Staff Group(s)

Assignment Category

Occupation Code  
 Person Type(s)  
 Employee Person Type(s)  
 Assignment Status  
 Primary Assignments Only  
 Effective Date (Default: Current Date)  
 Location  
 Organisation Level 1-13

## Index

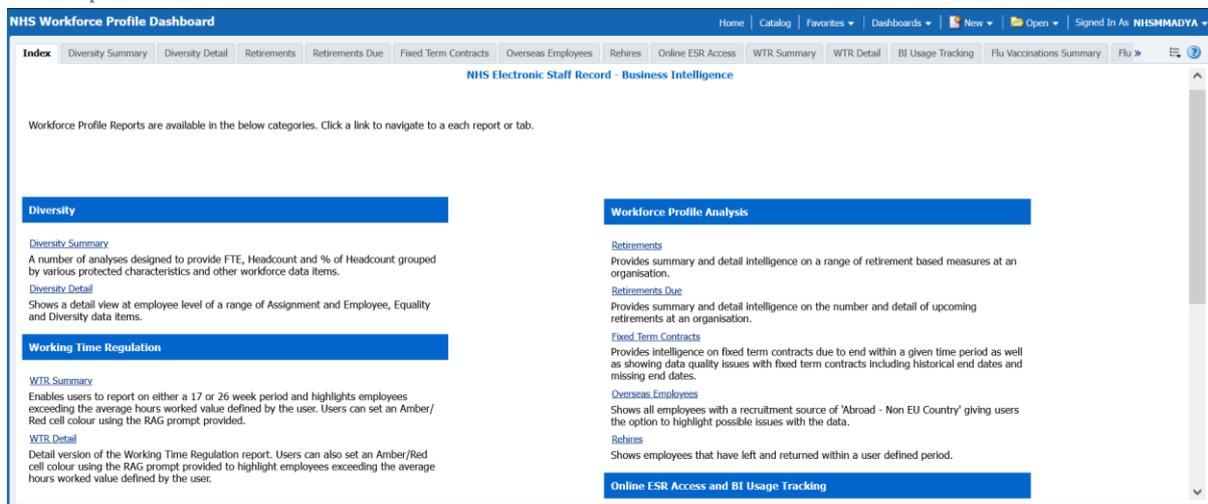
### Description

Workforce Profile dashboard reports are available in five different categories below:

- Diversity
- Workforce Profile Analysis
- Working Time Regulation
- Online ESR Access and BI Usage Tracking (please note that the BI Usage Tracking analysis is only available to BI Administrators)

From this tab users can click on links provided to navigate to reports.

### Example Screenshot



## Diversity Summary Tab

### Prompts

Graph Measure (show graphs as either Headcount, % of Headcount or FTE)

## Disability

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Disability Flag.

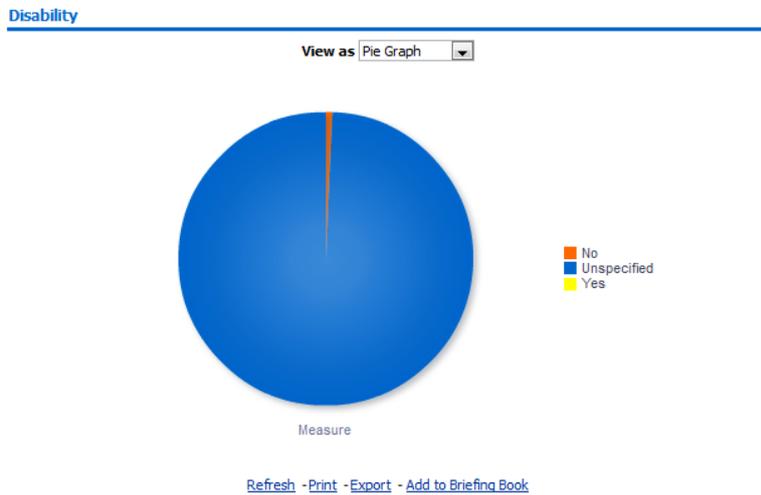
### Data Items

Title	Description
Disability Flag	Disability Flag against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Pie Graph)

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Disability Category

### Description

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

### Data Items

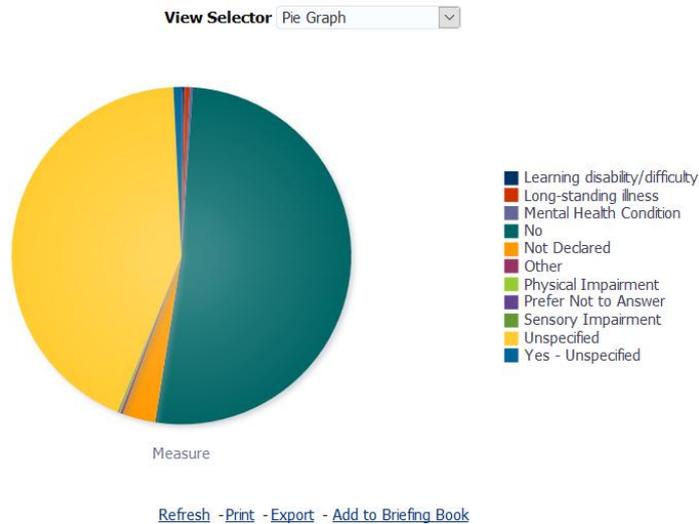
Title	Description
Disability Category	Disability Category against the Employee Record
Count of Disability Categories	
% of Disability Categories	
FTE of Disability Categories	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Pie Graph)

### Example Screenshot

#### Disability Category



### Actions

Click -> Diversity Detail Tab

## Disability Category (Workforce)

### Description

This analysis is designed to show Headcount and % of Headcount grouped by Disability Category.

### Data Items

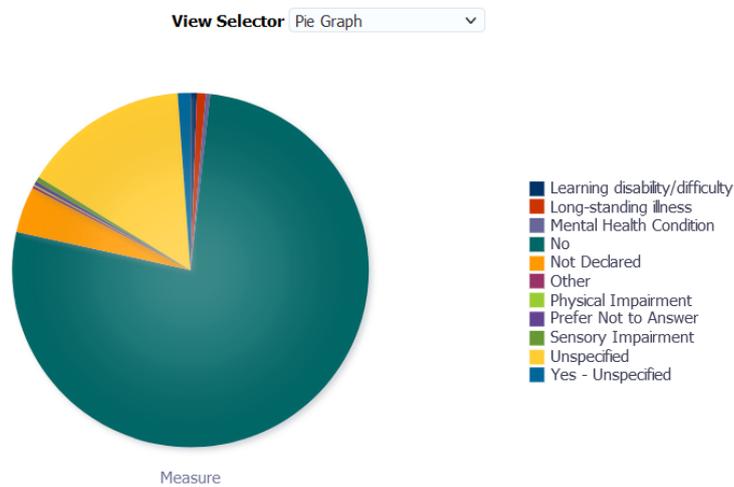
Title	Description
Disability Category	Disability Category against the Employee Record
Headcount	
% of Headcount	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Pie Graph)

### Example Screenshot

#### Disability Category (Workforce)



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

## Ethnicity

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Ethnic Group.

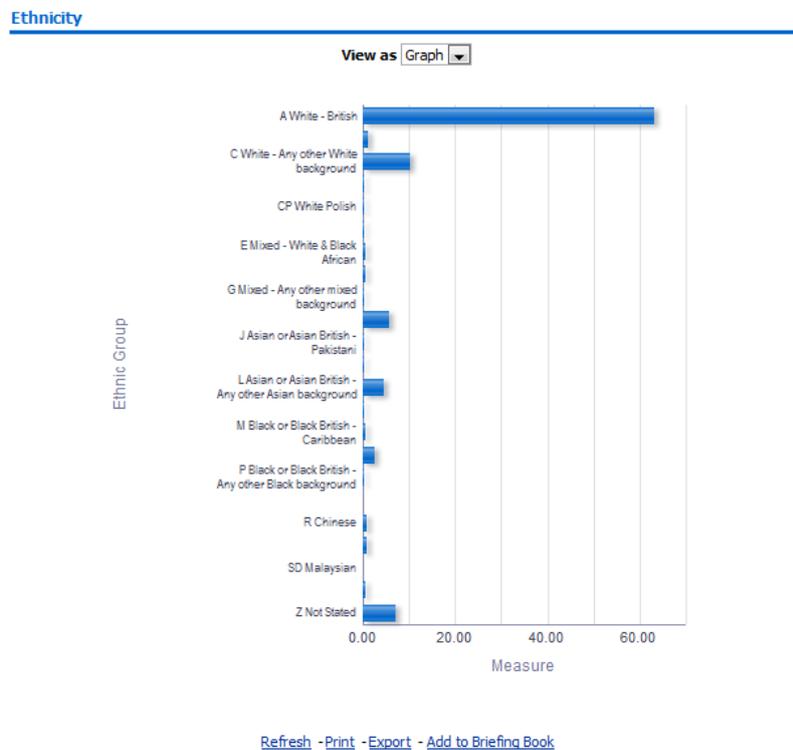
### Data Items

Title	Description
Ethnic Group	Ethnic Group against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Column Graph, Pie Graph, Table or Table inc. RAG Status (Default Column Graph)

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Gender

### Description

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

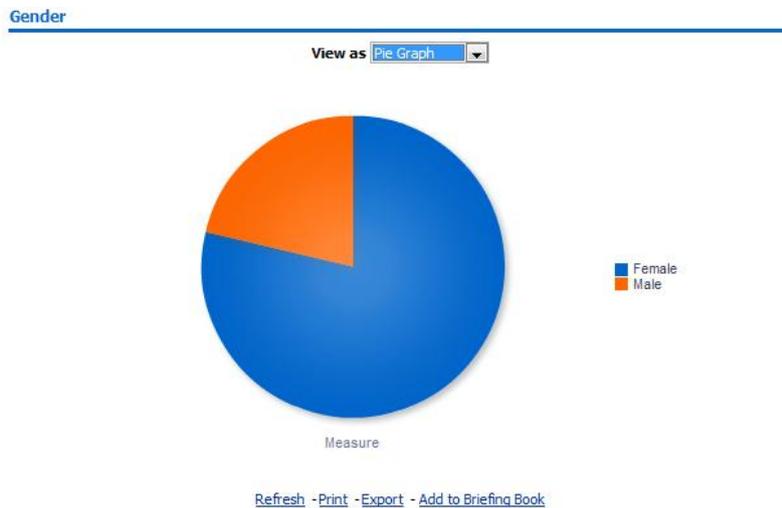
### Data Items

Title	Description
Gender	Gender against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

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

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Religion

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Religious Belief.

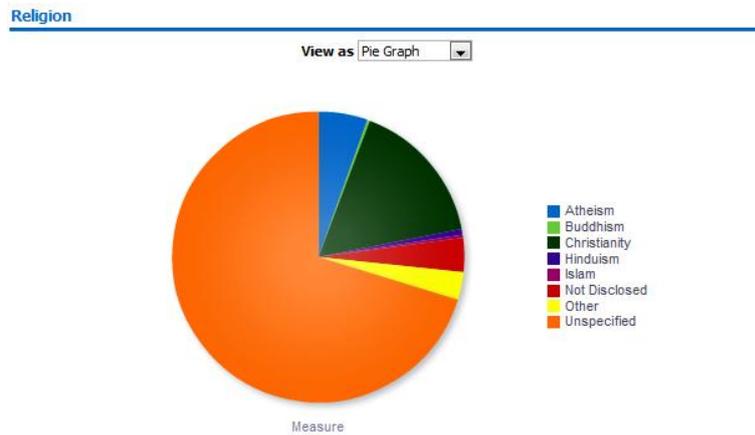
### Data Items

Title	Description
Religious Belief	Religious Belief against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Pie Graph)

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Sexual Orientation

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Sexual Orientation.

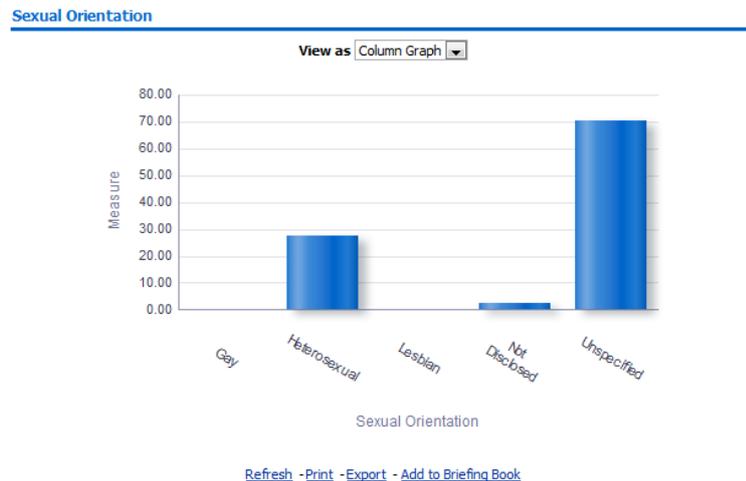
### Data Items

Title	Description
Sexual Orientation	Sexual Orientation against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Column Graph)

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Age Band

### Description

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

### Data Items

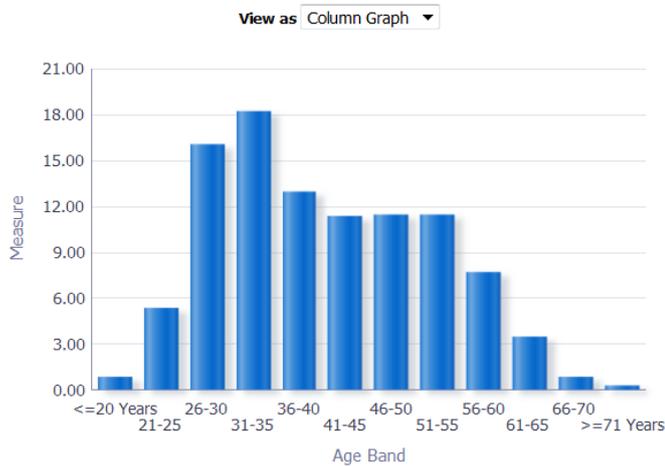
Title	Description
Age Band	Age Band Data Item
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Column Graph)

### Example Screenshot

#### Age Band



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

### Actions

Click -> Diversity Detail Tab

## Length of Service

### Description

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

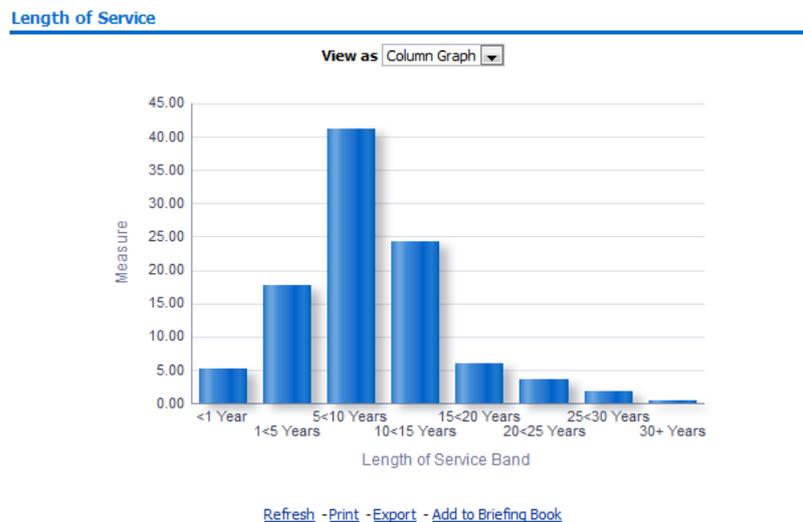
### Data Items

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

## Pay Band / Gender

### Description

This analysis is designed to show Pay Bands grouped by Gender.

### Data Items

Title	Description
Pay Band	
Measure	Count of employees split by Gender

### View Selectors

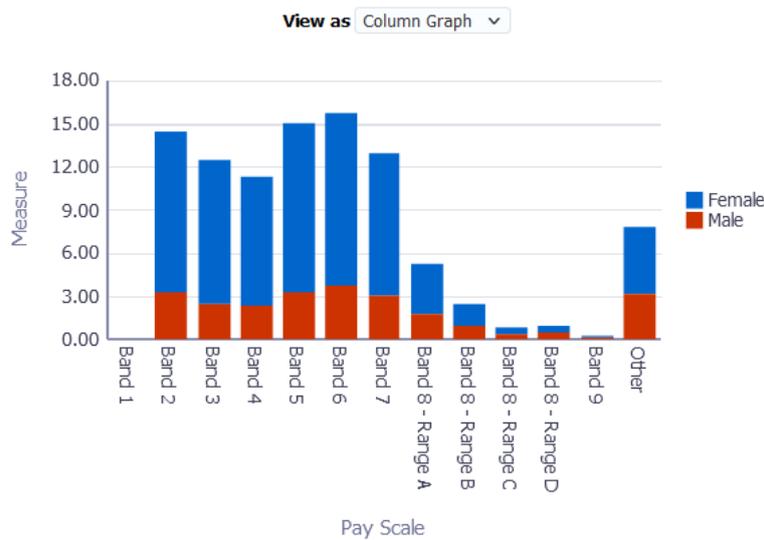
View as column graph or table. Default column graph.

### Actions

Click->Diversity Detail Tab

### Example Screenshot

#### Pay Band / Gender



## Employee Category

### Description

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

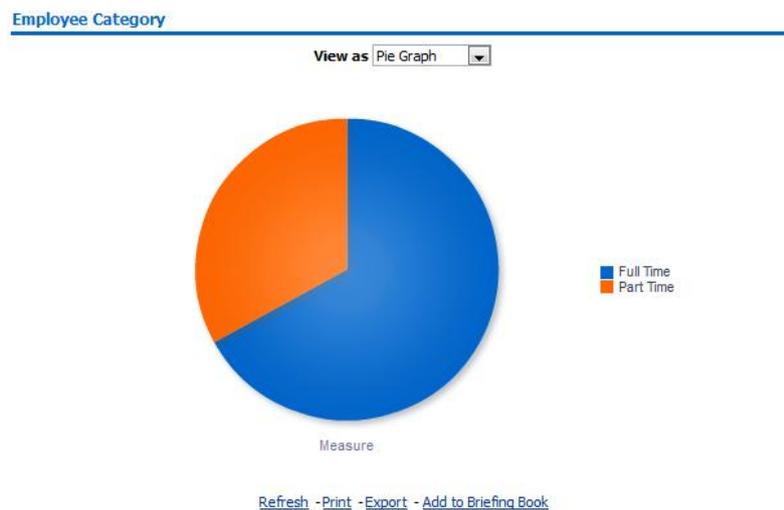
### Data Items

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

### View Selectors

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

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Employee Category / Gender

### Description

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

### Data Items

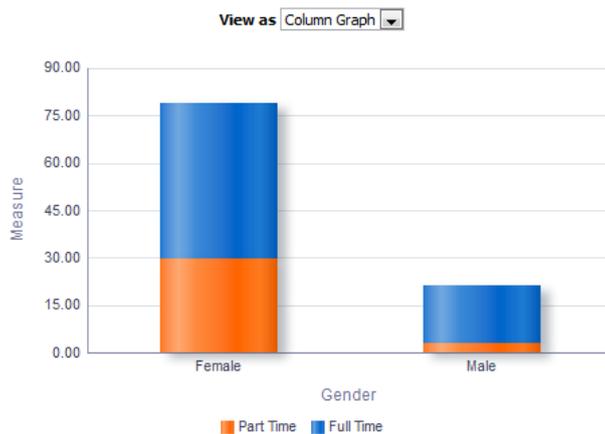
Title	Description
Employee Category	Employee Category Data Item against the Assignment
Gender	Gender against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

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

### Example Screenshot

#### Employee Category / Gender



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

### Actions

Click -> Diversity Detail Tab

## Marital Status

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Marital Status.

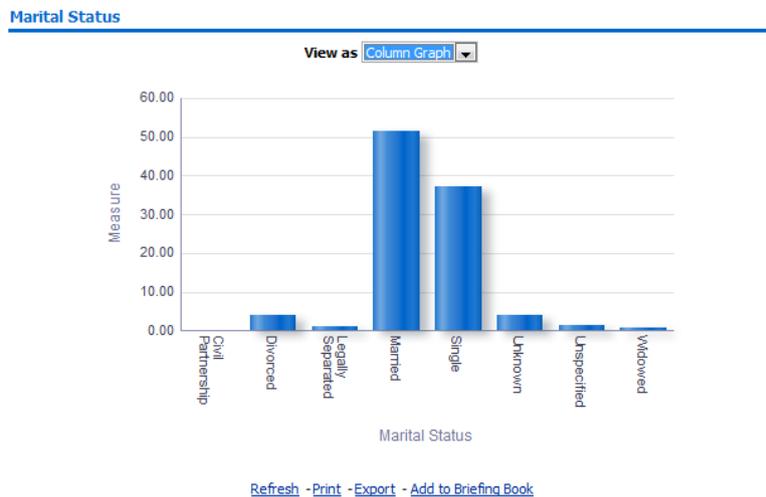
### Data Items

Title	Description
Marital Status	Marital Status against the Employee Record
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Pie Graph, Column Graph, Table or Table inc. RAG Status (Default Column Graph)

### Example Screenshot



### Actions

Click -> Diversity Detail Tab

## Assignment Category

### Description

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

### Data Items

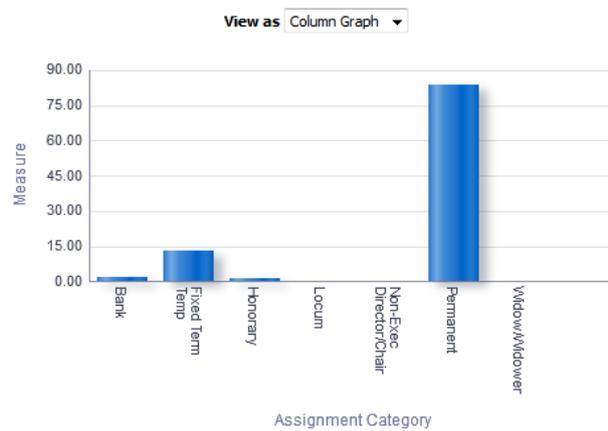
Title	Description
Assignment Category	
Headcount	
% of Headcount	
FTE	

### View Selectors

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

### Example Screenshot

#### Assignment Category



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### Actions

Click -> Diversity Detail Tab

## Flexible Working Pattern

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Flexible Working Pattern.

### Data Items

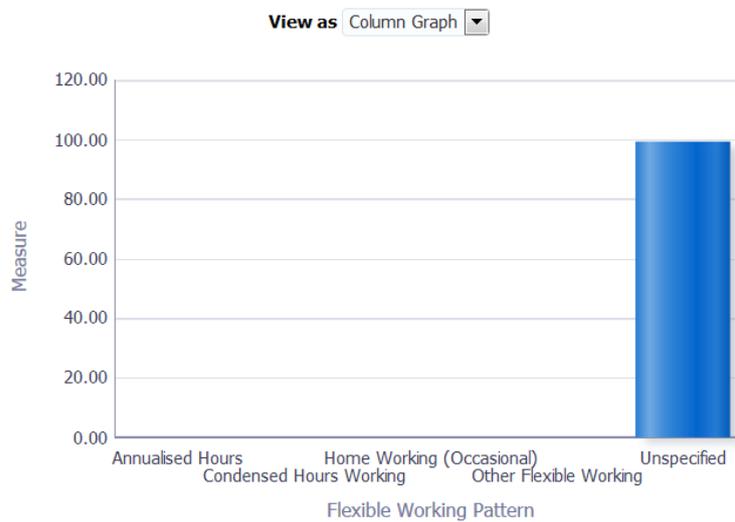
Title	Description
Flexible Working Pattern	Flexible Working Pattern Data Item against the Assignment
Headcount	
% of Headcount	
FTE	

### View Selectors

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

### Example Screenshot

#### Flexible Working Pattern



## Nationality

### Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Nationality or Nationality Group.

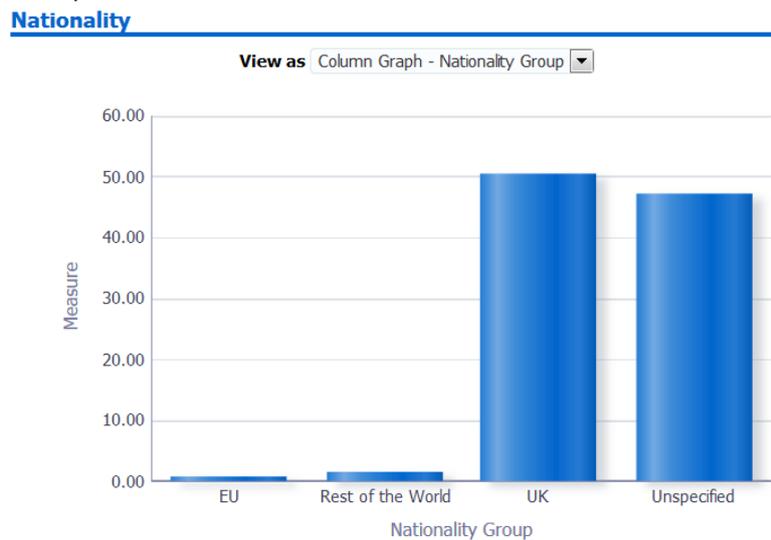
### Data Items

Title	Description
Nationality	Nationality against the Employee Record
Nationality Group	Group where employee Nationality falls under
Headcount	
% of Headcount	
FTE	

### View Selectors

View as Column Graph – Nationality Group, Column Graph – Nationality, Pie Graph, or Table  
(Default: Column Graph – Nationality Group)

### Example Screenshot



## Diversity Detail Tab

### Prompts

Length of Service Band

Age Band

Ethnic Origin

Gender

Disability

Disability Category

Religious Belief

Marital Status

Employee Category

Sexual Orientation

Nationality

\* Restrict to Latest Disability Category Only (Yes/No)

## Diversity Detail

### Description

This analysis is designed to show a detail view at employee level of a range of Assignment and Employee, Equality and Diversity data items.

### Data Items

Employee Number	Flexible Working Pattern
Assignment Number	AfC Pay Band
Last Name	Occupation Code
First Name	FTE
Title	Contract Hours
Employee Category	Pay Scale
Assignment Category	Job Sharer
Assignment Status	Census Nature of Contract
Supervisor Name	Length of Service Band
Supervisor Employee Number	Gender
Disability	Ethnic Origin
Organisation	Marital Status
Staff Group	Disability Category
Role	Age Band
Position Title	Religious Belief
Position Number	Nationality
Subjective Code	Ethnicity Group
Time in Grade (Yrs)	Sexual Orientation
Start Date in Grade	

### Column Selectors

Organisation Level x 4

## Retirements Tab

This tab provides intelligence around Retirements within a given period with data presented in a number of different views.

### *Prompts*

Organisation(s)

Staff Group(s)

\* Date Between

Occupation Code(s)

Employee Category

Person Type(s)

Employee Person Type(s)

Assignment Category

Job Role

Pay Grade(s)

Assignment Status

Primary Assignments Only

Recruitment Source

Leaving Reason (**Default:** Flexi Retirement, Retirement Age, Voluntary Early Retirement - no Actuarial Reduction, Voluntary Early Retirement - with Actuarial Reduction)

## Retirements Summary

### Description

The Summary Highlights analysis is designed to show top level Retirement figures within a given time period alongside another Summary analysis grouping those figures by a range of assignment and employee based fields.

### Groupings

Org Level 1-13

Staff Group

Pay Scale

Gender

Job Role

Supervisor Name

Supervisor Employee Number

### Data Items

Title	Description
Headcount	Headcount at the start of the period + Headcount at the end of the period / 2
No. of Retirements	Count of retired employees in the period
Retirement Rate	Percentage of retired employees in the period
Retirements Rate (55 and over)	Percentage of retired employees in the period aged 55 & over

### Example Screenshot

#### Retirements Summary

1,612

Headcount

12

Retirements

0.74%

Retirement Rate

3.11%

Retirement Rate (55 & Over)

Group by: Staff Group

Staff Group	Headcount	No. of Retirements	Retirement Rate	Retirement Rate (55 & Over)
Add Prof Scientific and Technic	55	0	0.00%	0.00%
Additional Clinical Services	273	3	1.10%	3.68%
Administrative and Clerical	565	4	0.71%	2.81%
Allied Health Professionals	152	1	0.66%	8.00%
Estates and Ancillary	76	1	1.32%	2.41%
Healthcare Scientists	165	1	0.61%	3.39%
Medical and Dental	87	0	0.00%	0.00%
Nursing and Midwifery Registered	237	2	0.84%	3.81%
Students	3	0	0.00%	0.00%
	0	0		0.00%
<b>Grand Total</b>	<b>1,612</b>	<b>12</b>	<b>0.74%</b>	<b>3.11%</b>

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## Retirements Timeline

### Description

This analysis is designed to show the Number of Retirements or Retirement Rate within a given time period grouped by Month or Age (on the X Axis).

### Prompts

Date Between

### Measures

Number of Retirements

Retirements Rate

### Groupings

Month (Default)

Age

### Data Items

Title	Description
Year	
Month	
Headcount	Headcount at the start of the period + Headcount at the end of the period / 2
No. of Retirements	Count of retired employees in the period
Retirement Rate	Percentage of retired employees in the period
Retirements Rate (55 and over)	Percentage of retired employees in the period aged 55 & over

### View Selectors

Line Graph (Default)

Table

### Example Screenshot



## Retirements Due Tab

The Retirements Due tab provides summary and detail intelligence on the number and detail of upcoming retirements at an organisation. A prompt allows the retirement age to be entered as required and the period of time to display up-coming retirements can also be varied within the detail analysis.

### *Prompts*

Retirement Age (Default to 60)

Detail Display (Due Now, Within 3, 6, 9, 12 months and 5 years. Default: Due Now)

## Retirements Due Summary

### Description

This analysis is designed to show the number of Retirements up to a prompted date range and grouped by Staff Group, Pay Scale, Gender or Organisation.

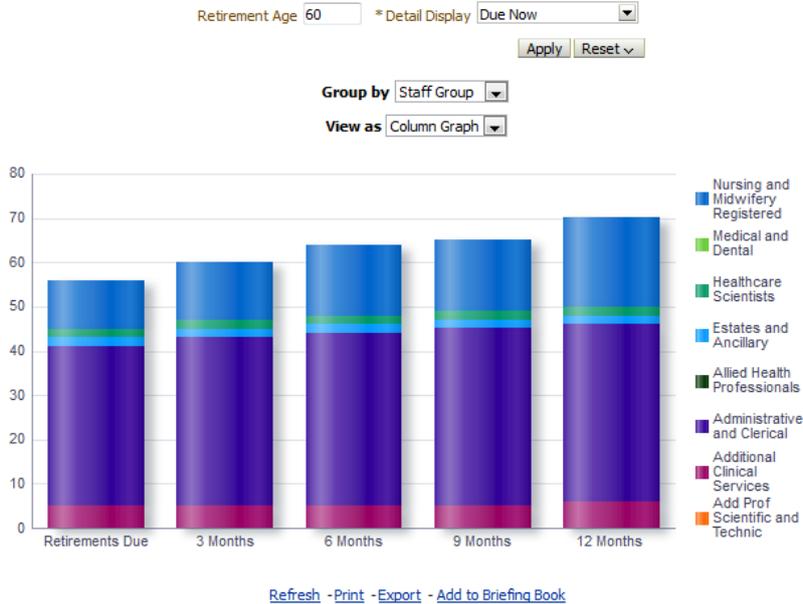
### Data Items

Title	Description
Staff Group	
Pay Scale	
Gender	
Organisation	
Retirements Due	Custom Formula based on Retirement Age input
3 Months	Custom Formula based on Retirement Age input
6 Months	Custom Formula based on Retirement Age input
9 Months	Custom Formula based on Retirement Age input
12 Months	Custom Formula based on Retirement Age input
5 Years	Custom Formula based on Retirement Age input

### View Selectors

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

### Example Screenshot



## Retirements Due Detail

### Description

This analysis provides a detail view of a range of employee and assignment data items for Retirements Due.

### Data Items

Employee Number	Pay Scale
Assignment Number	Pay Scale Description
Title	Pay Step Date
Last Name	Length of Service
First Name	Person Type
Date of Birth	Years
Staff Group	Months
Role	Projected Termination Date
Position Title	FTE
Organisation Level 1-13	

### Filters

Detail Display (Due Now, Within 3, 6, 9, 12 months and 5 years. Default: Due Now)

## Fixed Term Contracts Tab

The Fixed Term Contracts Tab provides intelligence on fixed term contracts due to end within a given time period as well as showing data quality issues with fixed term contracts including historical end dates and missing end dates.

## Future Fixed Term Dates Summary

### Description

This analysis is designed to show the number of Fixed Term Contracts due to end within the next three, six, nine or twelve months grouped by either Fixed Term Reason, Gender, Pay Scale, Staff Group or Organisation.

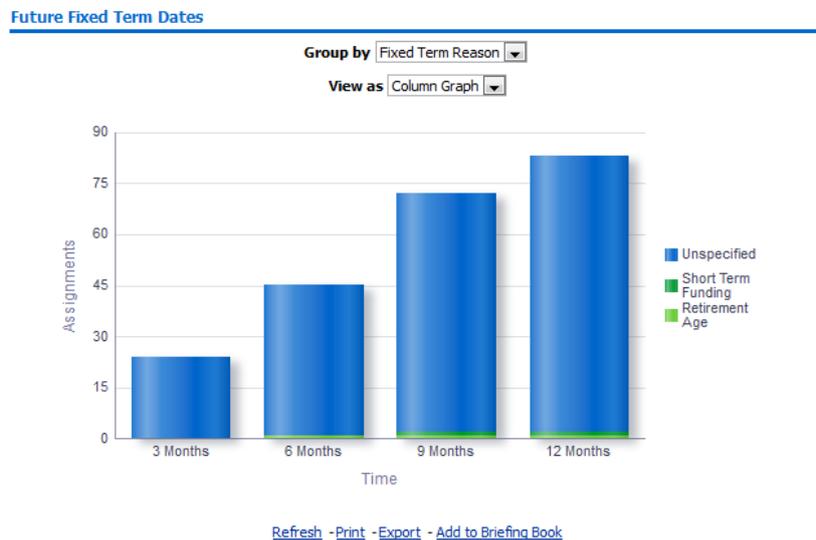
### Data Items

Title	Description
Fixed Term Reason	
Pay Scale	
Gender	
Organisation	
Staff Group	
3 Months	Custom Formula based on the 'Fixed Term Temp Cont End Date'
6 Months	Custom Formula based on the 'Fixed Term Temp Cont End Date'
9 Months	Custom Formula based on the 'Fixed Term Temp Cont End Date'
12 Months	Custom Formula based on the 'Fixed Term Temp Cont End Date'

### View Selectors

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

### Example Screenshot



## Fixed Term Problems Summary

### Description

This analysis is designed to show the number of Fixed Term Contracts with either an historical end date, future end date or no end date grouped by either Fixed Term Reason, Gender, Pay Scale, Staff Group or Organisation.

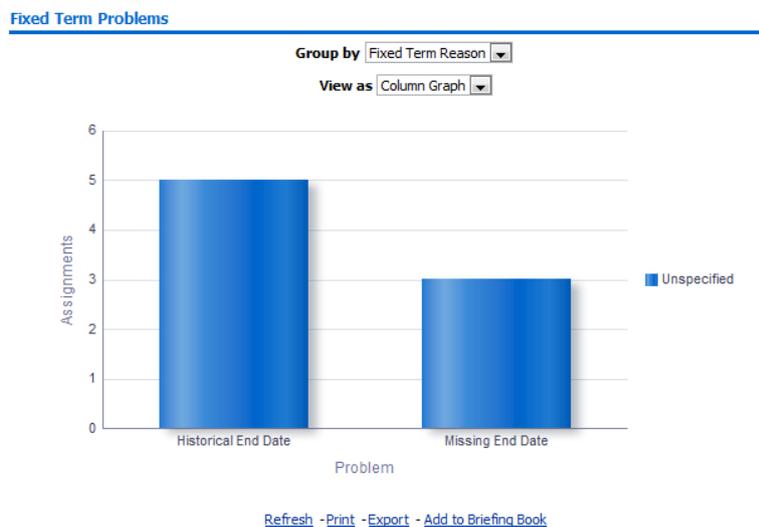
### Data Items

Title	Description
Fixed Term Reason	
Pay Scale	
Gender	
Organisation	
Staff Group	
Future End Date	Custom Formula based on the 'Fixed Term Temp Cont End Date'
Historical End Date	Custom Formula based on the 'Fixed Term Temp Cont End Date'
Missing End Date	Custom Formula based on the 'Fixed Term Temp Cont End Date'

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Fixed Term Date Detail

### Description

This analysis is designed to show the number of Fixed Term Contracts with either an historical end date or no end date grouped by either Fixed Term Reason, Gender, Pay Scale, Staff Group or Organisation.

### Prompts

Fixed Term End Date Between

### Filters

Fixed Term End Date Between: The user has the option to enter a date period to view Fixed Term End Dates (Default to future three months).

### Data Items

Employee Number	Organisation
Assignment Number	Pay Scale
Title	Pay Scale Description
First Name	Pay Step Date
Last Name	Effective Start Date
Staff Group	Fixed Term Temp Cont End Date
Role	Fixed Term Temp Cont Reason
Position Title	Primary Assignment
FTE	Supervisor Employee Number
Supervisor Name	Supervisor Email Address
Organisation Level 1-13	Assignment Status

## Overseas Employees Tab

The Overseas Employees Tab is designed to show all employees with a recruitment source of 'Abroad - Non EU Country' giving users the option to highlight (currently) three possible issues with the data:

- Null NI Number
- Null Country of Birth
- Null Nationality

The dashboard page also includes a number of summary counts based on overseas recruitment.

### Prompts

Organisation(s)

Exclude organisation(s)

Staff Group

Assignment Category

Person Type

Employee Person Type

Assignment Status

Occupation Code

Primary Assignments Only

Employee Location

Recruitment Source  
Effective Date (default: Current Date)  
Nationality  
Nationality Group

## Overseas Employee Timeline

### Description

This analysis is designed provide a Headcount of Employees with a recruitment source of Abroad - Non EU Country across a user defined period.

### Data Items

Month	Employee Headcount
-------	--------------------

### View Selectors

Bar Graph (default)

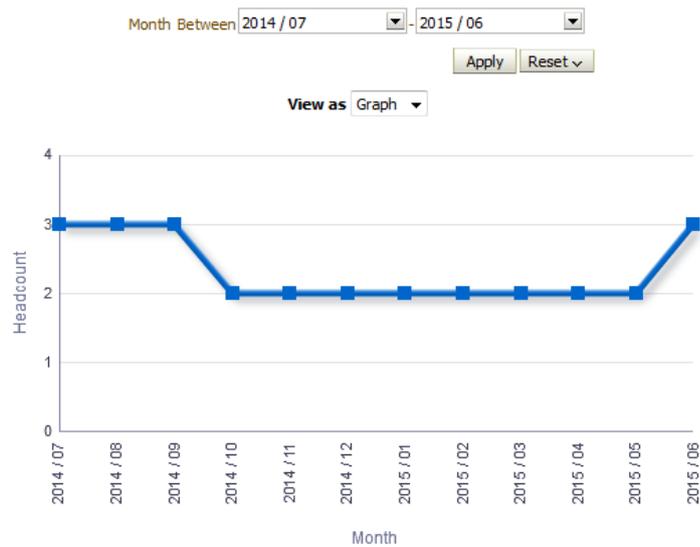
Table

### Prompts

Months Between (default: previous full 12 months)

### Example Screenshot

#### Overseas Employees Timeline



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

## Overseas Employee Summary

### Description

This analysis is designed provide a Headcount of Employees with a recruitment source of Abroad - Non EU Country as at the dashboard effective date and grouped by a range of data items.

### Data Items

Staff Group	Employee Headcount
Age Band	Pay Grade
Assignment Status	Occupation Code
Organisation Level (1-4)	

### View Selectors

Bar Graph (default)

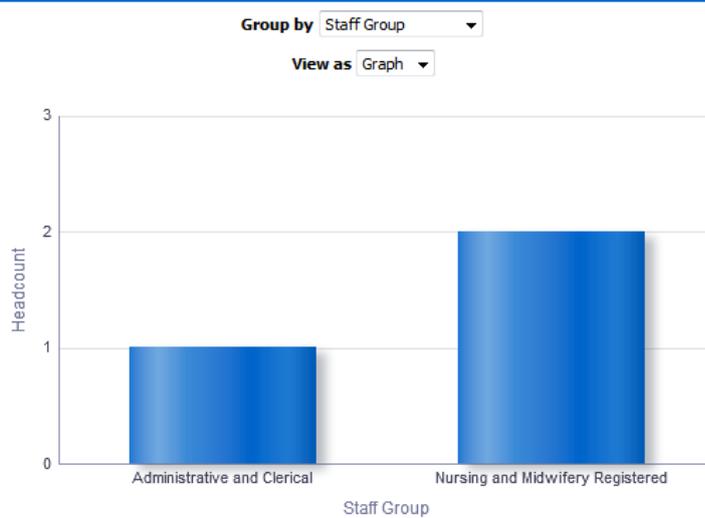
Table

### Prompts

None

### Example Screenshot

#### Overseas Employee Summary



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

## Overseas Employee Detail

### Description

This analysis is designed provide a detail view of overseas employees with users having the option to highlight certain missing data items related to overseas employees.

### Data Items

Employee Number	Last Name
First Name	Title
NI Number	FTE
Organisation	Staff Group
Recruitment Source	Country of Birth
Nationality	Position

### View Selectors

None

### Prompts

Highlight Null NI Numbers

Highlight Null Country of Birth

Highlight Null Nationality

### Example Screenshot

Employee Number	Last Name	First Name	Title	NI Number	FTE	Organisation	Staff Group	Recruitment Source	Country of Birth	Nationality	Position
20055417	007.lane	Sarah	Mrs.	WA504375A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055651	007.lawrence	Mary	Mrs.	WA504186A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055462	007.lewis	Sarah	Miss	WA504259A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84566 Health Care Asst Band 3 N7A Surgery
20055290	007.neville	Christine	Mrs.	WA504230A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055459	007.smith	Ben	Mr.	WA504244A	0.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055550	008.holloway	Simon	Mr.	WA504202A	0.53	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055247	008.lawrence	Mary	Mrs.	WA504185A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055561	008.lewis	Sarah	Miss	WA504260A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84566 Health Care Asst Band 3 N7A Surgery
20055577	008.smith	Ben	Mr.	WA504245A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20055529	008.steele	Kerry	Mrs.	WA504215A	0.60	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278 Staff Nurse Band 5 N6A Surgery
20095269	320	Monica	Miss	JC123432A	1.00	504 Ward 10	Nursing and Midwifery Registered	Abroad - Non-EU Country	Spain	British	84608 Staff Nurse Band 6 N6A Surgery
20095048	320	Neela	Mrs.	JC123476A	1.00	504 Ward 10	Nursing and Midwifery Registered	Abroad - Non-EU Country	India	British	84608 Staff Nurse Band 6 N6A Surgery
20055584	Anton25	Gloria	Ms.	NE504108A	1.00	504 Acute Nurse Management	Nursing and Midwifery Registered	Abroad - Non-EU Country	United Kingdom	British	84764 Sister/Charge Nurse Band 7 N6A Surgery

## Rehires Tab

### Description

The Rehires tab is designed to show employees that have left and returned within a user defined period. The analysis is based on differing employee numbers but matching National Insurance Numbers, both of which are shown in the analysis.

### Data Items

National Insurance Number	Employee Number
Employee Name	Latest Start Date
Actual Termination Date	Leaving Reason
IAT Date	IAT Source VPD
IAT Destination VPD	IAT Operation

### View Selectors

None

## Prompts

None

## Example Screenshot

NI Number	Employee	Employee Name	Latest Start Date	Actual Termination Date	Leaving Reason	IAT Date	IAT Source VPD	IAT Destination VPD	IAT Operation
JB000000B	12345678	Blogs, Mr. Joe	01/06/2012	14/03/2018	Retirement Age	16/04/2013	040	120	PDS Applied
JB000000B	12345678	Blogs, Mr. Joe	03/08/2016	06/03/2018	End of Fixed Term Contract	21/03/2018	120	130	PDS Taken
JB000000B	12345678	Blogs, Mr. Joe	02/08/2017						
JB000000B	12345678	Blogs, Mr. Joe	26/12/2017						
JB000000B	12345678	Blogs, Mr. Joe	07/03/2018						
JB000000B	12345678	Blogs, Mr. Joe	28/03/2018			18/04/2018	120	120	PDS Requested

## Online ESR Access Tab

The Online ESR Access Tab provides intelligence on who has a user account, registered for internet access and step up access, and the last dates they logged into ESR (either via W3 or N3).

## 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)

Subjective Code(s)

Primary Assignments Only

Effective Date

## Summary

### Description

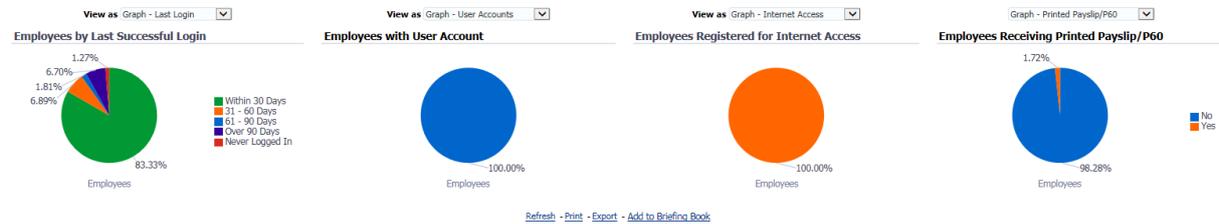
This analysis is designed to show the numbers of employees who have a user account, are registered for internet access, and the last dates they logged into ESR. It also includes the number of employees receiving printed paper Payslip/P60 against the number of employees receiving their Payslip/P60 online.

### View Selectors

Pie Graph x 4 (default)

Pivot Table x 4

### Example Screenshot



## Detail

### Description

This analysis is designed to show whether employees have a user account and if so, whether they have registered for internet access and step up access.

### Column Selectors

Organisation Level 1-13

### Data Items

Employee Number	FTE
Assignment Number	Staff Group
Last Name	Occupation Code
First Name	Person Type
Title	Pay Grade
Employee Name	Contract Hours
Email	Frequency
Supervisor	Fixed Term End Date
Org L1-13	Latest Start Date
Location	Primary Assignment (Y/N)
Payroll Name	Has User Account (Y/N)
Position Number	Registered for Employee Internet Access (Y/N)
Position Title	Internet Access Status
Employee Category	Last Logon Date
Assignment Category	Registered for Manager Internet Access
Assignment Status	Receive Printed Pay Details
MFA Opt-in	

### Example Screenshot

Person Type	Pay Grade	Contract Hours	Frequency	Fixed Term End Date	Latest Start Date	Primary Assignment	Has User Account	Registered for Employee Internet Access	Internet Access Status	Last Logon Date	Registered for Manager Internet Access
Employee and Applicant	NHS[XR10]Review Body Band 10 - Range D	37.50	Week		04/01/2000	Y	Y	Y	Approved	17/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	31/07/2019	01/08/2017	Y	Y	N		28/03/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	31/07/2019	14/08/2017	Y	Y	N		03/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	05/03/2021	05/09/2016	Y	Y	N		12/04/2018	N
Employee and Applicant	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	27/08/2019	28/11/2017	Y	Y	Y	Approved	18/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	15/07/2019	15/01/2018	Y	Y	N		23/03/2018	N
Employee and Applicant	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	07/07/2019	04/09/2017	Y	Y	N		09/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	17/03/2016	03/01/2012	Y	Y	N		28/03/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	14/08/2018	14/08/2017	Y	Y	Y	Approved	13/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	20/05/2019	20/11/2017	Y	Y	N		09/04/2018	N
Employee	NHS[XR10]Review Body Band 10 - Range D	37.50	Week	30/06/2019	02/01/2018	Y	Y	N		12/03/2018	N

## Working Time Regulation Summary

### Description

This WTR Summary analysis is employee based and enables users to report on either a 17 or 26 week period and highlights employees exceeding the average hours worked value defined by the user. It also enables users to set an Amber/Red cell colour depending on user defined threshold values.

Please note that the analysis is based on Payroll Periods with either 4 monthly payrolls or 17 weekly payrolls used inline with the 17 week average defined in the guidance. By default the date period will be the last day of the previous month looking back 17 weeks however users can use the 26 week check box available on the dashboard when analysing Junior Doctors.

### Prompts

- Period End Date
- Employee Number
- Payroll
- Staff Group
- Role
- Occupation Code
- Person Type
- Employee Person Type
- Assignment Status
- \* Session Multiplier
- Included Elements
- Included Allowance Types
- Use 26 Week Period (for Junior Doctors)
- Restrict to an average of greater than 48 hours
- Set Avg Hours Worked Amber From
- Red From

### Data Items

Employee Name	Avg Hours Worked
Employee Number	WTR Opt Out
Units Worked	WTR Opt Out Date
Hours Worked	

### Example Screenshot

Set Avg Hours Worked Amber From  Red From

This analysis is based on Payroll Periods with either 4 monthly payrolls or 17 weekly payrolls used inline with the 17 week average defined in [guidance](#). By default the date period will be the last day of the previous month looking back 17 weeks however users can use the 26 week check box when analysing Junior Doctors.

Employee Name	Employee Number	Units Worked	Hours Worked	Avg Hours Worked	WTR Opt Out	WTR Opt Out Date
Blogs, Mr. Joe	12345678	651.80	651.80	37.50	N	01/12/2008
Blogs, Mr. Joe	12345678	651.80	651.80	37.50	N	06/05/2009
Blogs, Mr. Joe	12345678	527.86	527.86	30.37	N	28/11/2011
Blogs, Mr. Joe	12345678	16,580.58	16,580.58	953.95	N	
Blogs, Mr. Joe	12345678	730.00	730.00	42.00	No	23/12/2008
Blogs, Mr. Joe	12345678	1,694.68	1,694.68	97.50	No	06/05/2009
Blogs, Mr. Joe	12345678	651.80	651.80	37.50	No	05/10/2009
Blogs, Mr. Joe	12345678	9,308.48	9,308.48	535.56	No	
Blogs, Mr. Joe	12345678	675.00	675.00	37.50	Y	04/12/2008
Blogs, Mr. Joe	12345678	1,058.68	1,058.68	60.91	Y	05/12/2008
Blogs, Mr. Joe	12345678	675.00	675.00	37.50	Y	08/12/2008

## Working Time Regulation Detail

### Description

The WTR detail analysis is assignment based and enables users to report on either a 17 or 26 week period and highlights employees exceeding the average hours worked value defined by the user.

The analysis also enables users to set an Amber/Red cell colour depending on user defined threshold values.

Please note that the analysis is based on Payroll Periods with either 4 monthly payrolls or 17 weekly payrolls used inline with the 17 week average defined in the guidance. By default the date period will be the last day of the previous month looking back 17 weeks however users can use the 26 week check box available on the dashboard when analysing Junior Doctors.

### *Prompts*

Period End Date  
 Employee Number  
 Payroll  
 Staff Group  
 Role  
 Occupation Code  
 Person Type  
 Employee Person Type  
 Assignment Status  
 \* Session Multiplier  
 Included Elements  
 Included Allowance Types  
 Use 26 Week Period (for Junior Doctors)  
 Restrict to an average of greater than 48 hours  
 Set Avg Hours Worked Amber From  
 Red From

### *Data Items*

Employee Name	Avg Hours Worked
Employee Number	Org Level 1-13
Assignment Number	WTR Opt Out
Staff Group	WTR Opt Out Date
Organisation Name	Frequency
Position Title	Period End Date
Pay Scale	AfC Pay Grade
Units Worked	Element Name
Hours Worked	

### *View Selector*

Table  
 Table (including Element Name)

## Example Screenshot

Set Avg Hours Worked Amber From  Red From

Group by  and  and

Employee Name	Employee Number	Assignment Number	Staff Group	Org L2	Org L3	Units Worked	Hours Worked	Avg Hours Worked	WTR Opt Out	WTR Opt Out Date	Frequency	Period End Date
Blogs, Mr. Joe	12345678	12345678	Medical and Dental	000 NHS ESR Organisation	000 NHS ESR Organisation	4,917.45	4,917.45	5,756.46			Week	31/08/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	13,605.22	13,605.22	3,446.42			Week	31/07/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	2,004.99	2,004.99	2,924.07			Week	31/08/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	13,211.80	13,211.80	2,634.12			Week	31/05/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	150.00	150.00	1,432.50			Week	05/05/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	150.00	150.00	1,432.50			Week	12/05/2018
Blogs, Mr. Joe	12345678	12345678	Administrative and Clerical	000 NHS ESR Organisation	000 NHS ESR Organisation	150.00	150.00	1,432.50			Week	19/05/2018

## BI Usage Tracking

### Description

The BI Usage Tracking analysis enables users to view usage of BI across the organisation. Please note that this analysis is only available to BI Administrators.

### Prompts

- Year Month
- User Name
- Dashboard
- Run Time (minutes) >

### Data Items

Year Month	Query Count
Date	Average Time In Seconds
User Name	Average Time In Minutes
Dashboard	User Count
Analysis	

## Example Screenshot

Analysis	Query Count	Average Time In Seconds	Average Time In Minutes	User Count
/shared/NHS Standard Dashboards/NHS Absence Dashboard Items/NHS Absence Timeline Detail	1	21.00	0.35	1
/shared/NHS Standard Dashboards/NHS Absence Dashboard Items/NHS Organisation Absence	1	10.00	0.17	1
/shared/NHS Standard Dashboards/NHS Absence Dashboard Items/NHS Organisation Absence Timeline	1	16.00	0.27	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Appraisal Review Detail	1	10.00	0.17	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Appraisal Review Expiry	2	9.50	0.16	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Appraisal Review KPI	1	11.00	0.18	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Appraisal Review Summary	1	10.00	0.17	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Appraisal Reviews by Staff Group	1	11.00	0.18	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS DBS Check KPI	1	12.00	0.20	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS DBS Checks Summary	1	11.00	0.18	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Prof Reg KPI	1	15.00	0.25	1
/shared/NHS Standard Dashboards/NHS Staff Requirements Dashboard Items/NHS Prof Reg Summary	1	11.00	0.18	1

## Flu Vaccinations Summary

Please note that this tab is only available to Occupational Health and BI Administrator Users.

### Summary

This analysis is designed to provide the user with summary flu vaccination figures grouped by various data items such as Staff Group or Occupation Code.

### Prompts

- Effective Date
- Influenza Date Between
- Influenza Vaccination Type
- Exclude Open Ended Absence - Start Date <=
- Restrict to Frontline Healthcare Workers (Default: No)

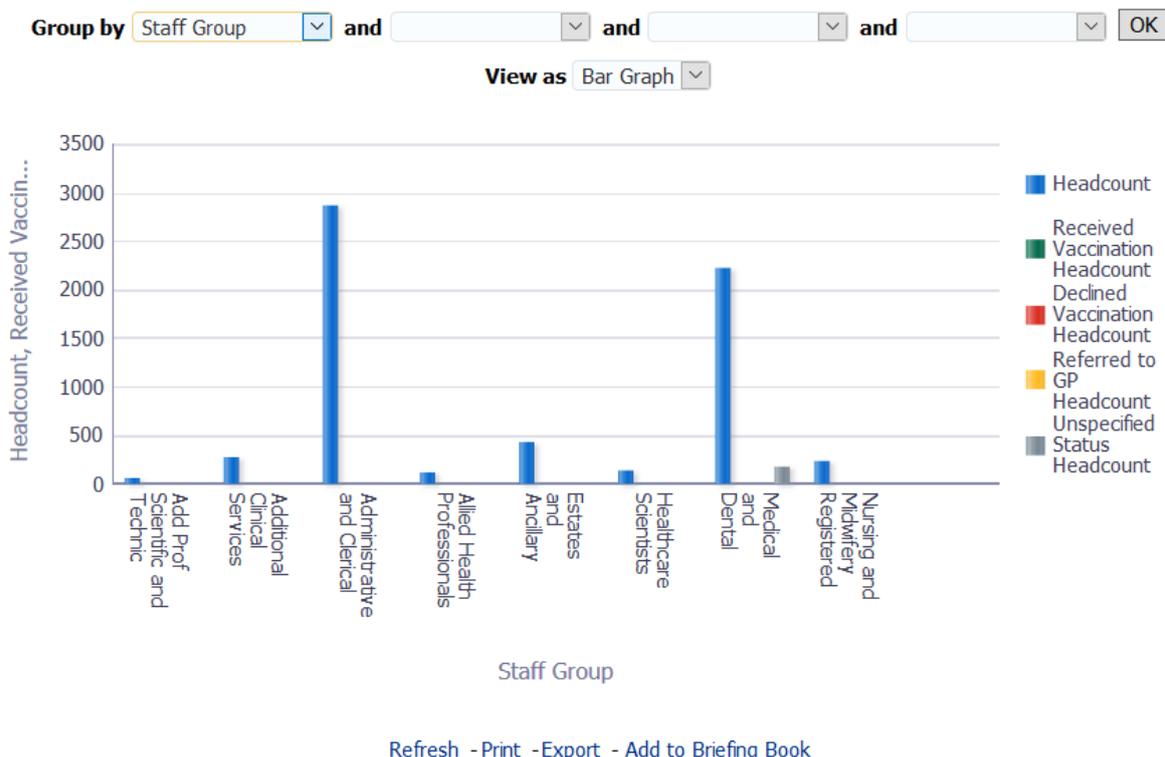
### View Selectors

- Bar Graph (default)
- Table

### Data Items

Staff Group	Declined Vaccination Headcount
Occupation Code	Declined Vaccination Headcount %
Job Role	Referred to GP Headcount
Headcount	Referred to GP Headcount %
Influenza Vaccination Headcount	Unspecified Status Headcount
Influenza Vaccination Headcount %	Unspecified Status Headcount %
Received Vaccination Headcount	Organisation Level 1-13 x 4 (Table View only)
Received Vaccination Headcount %	

### Example Screenshot



## UKHSA Return

This analysis is designed to assist users with the completion of the UKHSA flu return. Similar to the above Summary flu vaccination analysis, figures are also grouped by various data items such as Staff Group or Occupation Code.

### Prompts

Effective Date

Exclude Organisation(s)

Exclude Occupation Code(s)

Exclude Employee Number(s)

### Column Selectors

Staff Group

Role

Occupation Code

Organisation Level 1-13 x 4

### Data Items

Staff Group	Received Vaccination Headcount
Occupation Code	Received Vaccination Headcount %
Job Role	Declined Vaccination Headcount
Organisation Level 1-13 x 4	Declined Vaccination Headcount %
National Grouping	Referred to GP Headcount
Headcount	Referred to GP Headcount %
Influenza Vaccination Headcount	Unspecified Status Headcount
Influenza Vaccination Headcount %	Unspecified Status Headcount %

### Example Screenshot

UKHSA Return

Exclude Organisation(s) --Select Value-- Exclude Occupation Code(s) --Select Value-- Exclude Employee Number(s) --Select Value--

Apply Reset

Group by and and and OK

National Grouping	Headcount	Influenza Vaccination Headcount	Influenza Vaccination Headcount %	Received Vaccination Headcount	Received Vaccination Headcount %	Declined Vaccination Headcount	Declined Vaccination Headcount %	Referred to GP Headcount	Referred to GP Headcount %	Unspecified Status Headcount	Unspecified Status Headcount %
All Doctors	115	10	8.70%	3	2.61%	0	0.00%	0	0.00	7	6.09%
All other professionally qualified clinical staff	387	17	4.39%	2	0.52%	0	0.00%	0	0.00	15	3.88%
Qualified nurses, midwives and health visitors	288	45	15.63%	1	0.35%	0	0.00%	1	0.35	44	15.28%
Support to clinical staff	393	17	4.33%	1	0.25%	0	0.00%	0	0.00	16	4.07%
<b>Grand Total</b>	<b>1183</b>	<b>89</b>	<b>7.52%</b>	<b>7</b>	<b>0.59%</b>	<b>0</b>	<b>0.00%</b>	<b>1</b>	<b>0.35</b>	<b>82</b>	<b>6.93%</b>

Refresh - Print - Export - Add to Briefing Book

## Flu Vaccinations Detail

### Description

This analysis returns all employees and any flu data recorded against the employee record.

Please note that this report is only available to Occupational Health and BI Administrator Users.

## Prompts

Effective Date

Influenza Vaccination Type

Influenza Vaccination Status/Influenza Date Between

Only Emps Without/12 Months+ Vaccination Details (Yes)

Highlight Vaccinations greater than X Months

Exclude Open Ended Absence - Start Date <=

## Data Items

Employee Number	Age Band
Last Name	Gender
Title	Pay Grade
First Name	Length of Service Band
Staff Group	Supervisor Name
Role	Supervisor Employee Number
Email Address	Supervisor Email Address
Assignment Category	Influenza Vaccination Type
Org L1-13	Influenza Vaccination Status
Position Description	Influenza Date
Area Of Work	Status
Employee Location Name	Occupation Code
Frontline Healthcare Worker (Position)	Frontline Healthcare Worker (Assignment)

## Example Screenshot

Length of Service Band	Supervisor Name	Supervisor Employee Number	Supervisor Email Address	Influenza Vaccination Type	Influenza Vaccination Status	Influenza Date	Status
<1 Year	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	03/11/2008	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	11/10/2011	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	14/10/2011	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	01/11/2011	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	04/10/2012	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	18/10/2012	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	18/10/2012	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	25/01/2013	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	03/10/2013	Greater than 12 Months
1 to 2 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	03/10/2013	Greater than 12 Months
2 to 5 Years	Blogs, Mr. Joe	12345678	joe.blogs@nhs.net	Seasonal	Received vaccination	04/10/2013	Greater than 12 Months

## Covid-19 Vaccinations Summary

### Description

This analysis is designed to provide the user with summary Covid-19 vaccination figures grouped by various data items such as Staff Group, Occupation Code and protected characteristics.

Please note that this tab is only available to Occupational Health and BI Administrator Users.

## Prompts

Effective Date

Vaccine 1 Given

Vaccination 1 Date Administered Between

Vaccine 2 Given

Vaccination 2 Date Administered Between  
 Exclude Open Ended Absence - Start Date <=  
 Excl. New Starters from Vaccinations (Months)

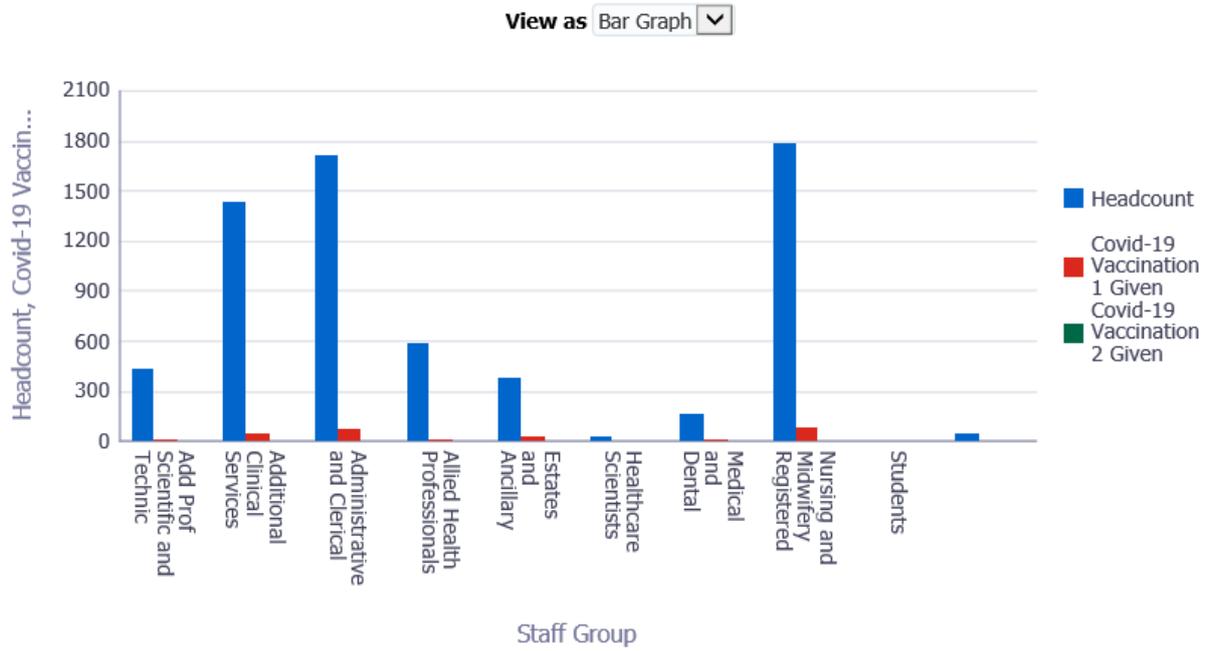
*Column Selectors (Table View only)*

Staff Group  
 Role  
 Occupation Code  
 Age Band  
 Nationality  
 Religious Belief  
 Sexual Orientation  
 Disability  
 Gender  
 Ethnic Origin  
 Org Levels 1-13

*Data Items*

Headcount	Role
Covid-19 Vaccination 1 Given	Occupation Code
Covid-19 Vaccination 1 Given %	Age Band
Covid-19 Vaccination 1 Not Given	Nationality
Covid-19 Vaccination 1 Not Given %	Religious Belief
Covid-19 Vaccination 2 Given	Sexual Orientation
Covid-19 Vaccination 2 Given %	Disability
Vaccination 2 Not Given	Gender
Covid-19 Vaccination 2 Not Given %	Ethnic Origin
Staff Group	Org Levels 1-13

Example Screenshot



## Covid-19 Vaccinations Summary (Ongoing Maintenance)

### Description

This analysis is designed to provide the user with summary Covid-19 vaccination (Ongoing Maintenance) figures grouped by various data items such as Staff Group, Occupation Code and protected characteristics.

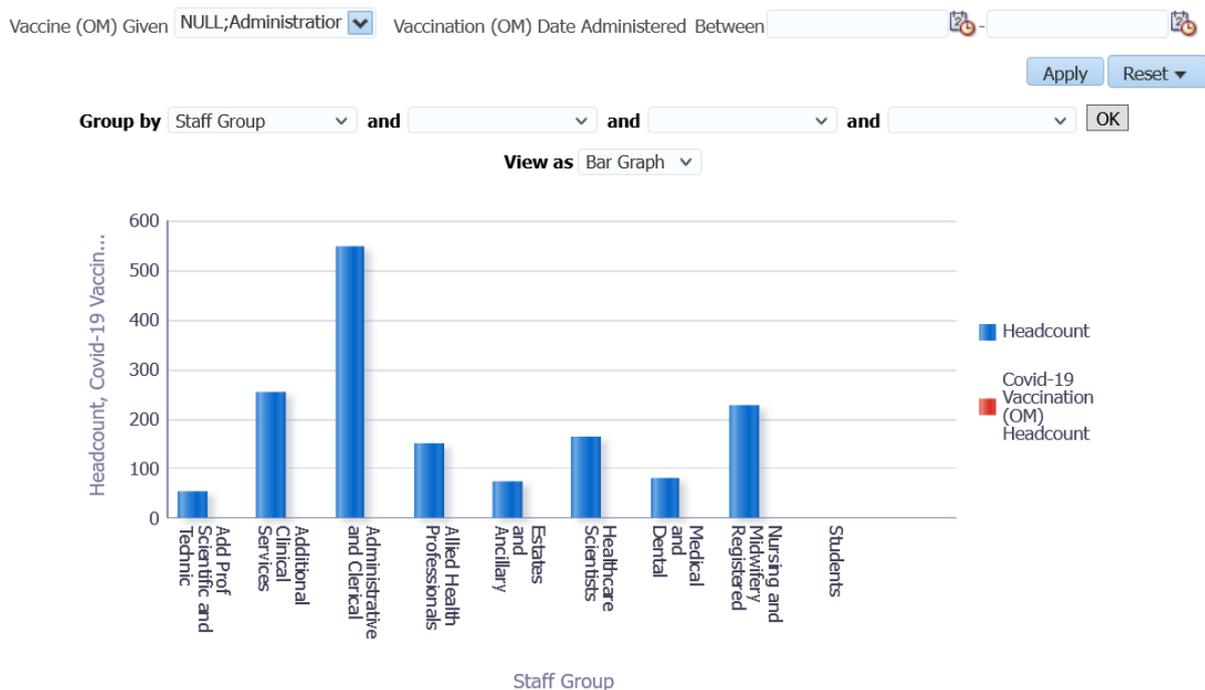
### Column Selectors (Table View only)

Staff Group  
Role  
Occupation Code  
Age Band  
Nationality  
Religious Belief  
Sexual Orientation  
Disability  
Gender  
Ethnic Origin  
Org Levels 1-13

### Prompts

Vaccine (OM) Given  
Vaccination (OM) Date Administered Between

### Example Screenshot



## Covid-19 Vaccinations Detail

### Description

This analysis returns all employees and any Covid-19 vaccination data recorded against the employee record.

Please note that this tab is only available to Occupational Health and BI Administrator Users.

### Prompts

Effective Date

Vaccine 1 Given

Vaccination 1 Date Administered Between

Vaccine 2 Given

Vaccination 2 Date Administered Between

Exclude Open Ended Absence - Start Date <=

Excl. New Starters from Vaccinations (Months)

### Column Selectors

Org Levels 1-13

Religious Belief

Sexual Orientation

Disability

Ethnic Origin

Please note that the above protected characteristics are not available to Occupation Health users

### Data Items

Employee Number	Vaccine 1 Reason Not Given
Last Name	Vaccination 1 Date Administered
Title	Vaccination 1 Recorded
First Name	Vaccination 1 Product
Staff Group	Vaccination 1 Manufacturer
Role	Vaccination 1 Batch Number
Email Address	Vaccination 1 Expiry Date
Assignment Status	Vaccination 1 Site
Assignment Category	Vaccination 1 Method
Position Description	Vaccination 1 Dose
Area Of Work	Vaccine 2 Given
Occupation Code	Vaccine 2 Not Given
Employee Location Name	Vaccination 2 Date Administered
Age Band	Vaccination 2 Recorded
Gender	Vaccination 2 Product
Ethnicity Group	Vaccination 2 Manufacturer
Religious Belief (not available to Occupation Health users)	Vaccination 2 Batch Number
Sexual Orientation (not available to Occupation Health users)	Vaccination 2 Expiry Date

Disability (not available to Occupation Health users)	Vaccination 2 Site
Ethnic Origin (not available to Occupation Health users)	Vaccination 2 Method
Pay Grade	Vaccination 2 Dose
Length of Service Band	Vaccine 2 Reason Not Given
Employee Latest Start Date	Created By
Supervisor Name	Created Date
Supervisor Employee Number	Last Updated By
Supervisor Email Address	Last Updated Date
Org Levels 1-13	Frontline Healthcare Worker (Position)
Vaccine 1 Given	Frontline Healthcare Worker (Assignment)
Vaccine 1 Not Given	

### Example Screenshot

Vaccine 1 Given	Vaccine 1 Not Given	Vaccine 1 Reason Not Given	Vaccination 1 Date Administered	Vaccination 1 Recorded	Vaccination 1 Product	Vaccination 1 Manufacturer	Vaccination 1 Batch Number
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose					Pfizer-BioNTech 30mg dose		
Administration of first dose			12/12/2020	29/12/2020	Pfizer-BioNTech 30mg dose	Pfizer	EJ0553
Administration of first dose					Pfizer-BioNTech 30mg dose		

## Covid-19 Vaccinations Detail (Ongoing Maintenance)

### Description

This analysis returns all employees and any Covid-19 vaccination (Ongoing Maintenance) data recorded against the employee record.

### Prompts

Vaccine (OM) Given

Vaccination (OM) Date Administered Between

### Column Selectors

Org Levels 1-13

Religious Belief

Sexual Orientation

Disability

Ethnic Origin

### Data Items

Employee Number	Supervisor Employee Number
Last Name	Supervisor Email Address
Title	Vaccine Given
First Name	Vaccine Not Given
Staff Group	Vaccine Reason Not Given
Role	Vaccination Date Administered
Email Address	Vaccination Date Recorded
Assignment Status	Vaccination Product
Assignment Category	Vaccination Manufacturer
Org Level 1-13	Vaccination Batch Number
Position Description	Vaccination Expiry Date
Area Of Work	Vaccination Site
Occupation Code	Vaccination Method
Employee Location Name	Vaccination Dose
Age Band	Created By
Gender	Last Updated By
Ethnicity Group	Last Updated Date
Pay Grade	Created Date
Length of Service Band	Frontline Healthcare Worker (Position)
Employee Latest Start Date	Frontline Healthcare Worker (Assignment)
Supervisor Name	

## Job Plan Reconciliation

This analysis is designed to enable users to compare job plan information stored in the person EIT against element entries.

Please note that this analysis is designed to be exported to Excel (.xlsx) only to ensure a single row per employee is returned.

Detailed descriptions and examples of how the analysis work are available via the 'What does this Dashboard do?' link available on the dashboard.

### Prompts

- Organisation(s)
- Assignment Category
- Person Type(s)
- Employee Person Type(s)
- Assignment Status
- Occupation Code
- Pay Grade(s)
- Effective Date

### View Selectors

- Bar Graph (default)
- Table

### Data Items

Employee Number	Job Plan - On Call Rate (%) / Band
Employee Name	Job Plan - On Call Rate (%) / Band Matching Basis
Professional Reg Number	On Call Rate (%)
Role	On Call Match
Staff Group	Job Plan - Total Contracted Activities
Org L6	Additional PAs
Pay Grade	Total PAs
Contract Hours/Sessions	Total PAs Match
FTE	Difference
Effective Date	Overpayment/Underpayment

### Example Screenshot

FTE	Effective Date	Job Plan - On Call Rate (%) / Band	Job Plan - On Call Rate (%) / Band Matching Basis	On Call Rate (%)	On Call Match	Job Plan - Total Contracted Activities	Additional PAs	Total PAs	Total PAs Match	Difference	Overpayment/Underpayment
1.0	01/01/2025				Yes			10.000			
1.0	26/09/2025				Yes		3.75	13.750			
1.0	01/11/2024				Yes			10.000			
0.7	25/04/2025				Yes			7.000			
0.4	01/05/2025				Yes			4.000			
0.8	14/09/2023				Yes			8.000			
0.2	09/04/2023				Yes			2.000			
1.0	01/09/2025				Yes		2.00	12.000			
1.0	01/06/2025				Yes		2.50	12.500			
1.0	01/04/2025				Yes		0.75	10.750			
0.4	01/09/2025				Yes			4.000			
1.0	01/02/2025				Yes		0.25	10.250			
1.0	07/11/2022				Yes			10.000			
1.0	19/01/2024				Yes		1.00	11.000			
1.0	11/12/2023				Yes		1.00	11.000			
0.7	07/05/2024				Yes			7.000			
1.0	01/01/2025				Yes		0.50	10.500			