NHS ELECTRONIC STAFF RECORD

ESR-NHS0241 - GUIDE TO ESRBI WORKFORCE PROFILE DASHBOARD

Information Classification: PUBLIC

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DOCUMENT CONTROL

CHANGE RECORD

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09/05/2016	Matt Madya	1.0	Initial Release
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12/02/2021	Matt Madya	22.0	Updated following new ESRBI developments
17/09/2021	Matt Madya	23.0	Updated following new ESRBI developments
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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
- Workforce Race Equality Standard (WRES)ONS Returns
- Retirements
- Fixed Term Contracts

Allocation

This dashboard is available to the following URPs:

XXX BI Administration

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)

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

- Retirements Due
- Fixed Term Contracts
- Overseas Employees
- Rehires
- Online ESR Access
- WTR Summary
- WTR 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
- Gender Pay Gap Reporting
- 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
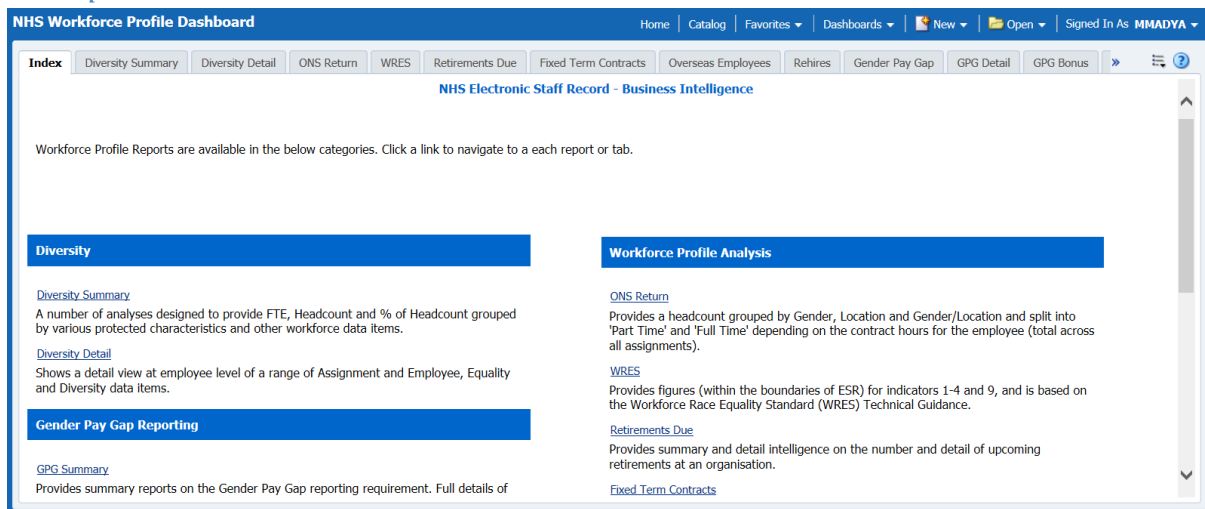
Diversity Summary Tab

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
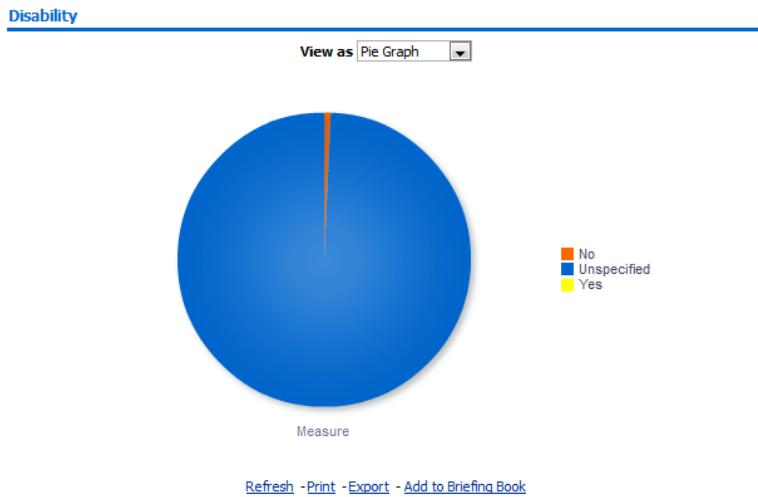
Actions

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

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)

View Selector Pie Graph

Legend:
- Learning disability/difficulty
- Long-standing illness
- Mental Health Condition
- No
- Not Declared
- Other
- Physical Impairment
- Prefer Not to Answer
- Sensory Impairment
- Unspecified
- Yes - Unspecified

Measure
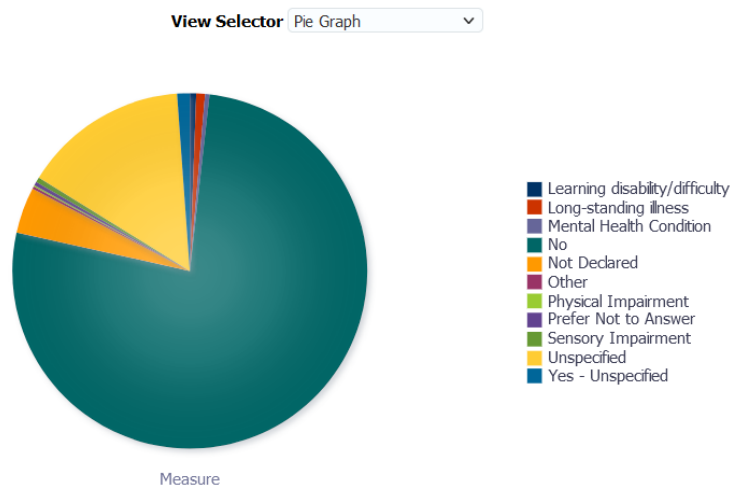
Refresh - Print - Export - Add to Briefing Book

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
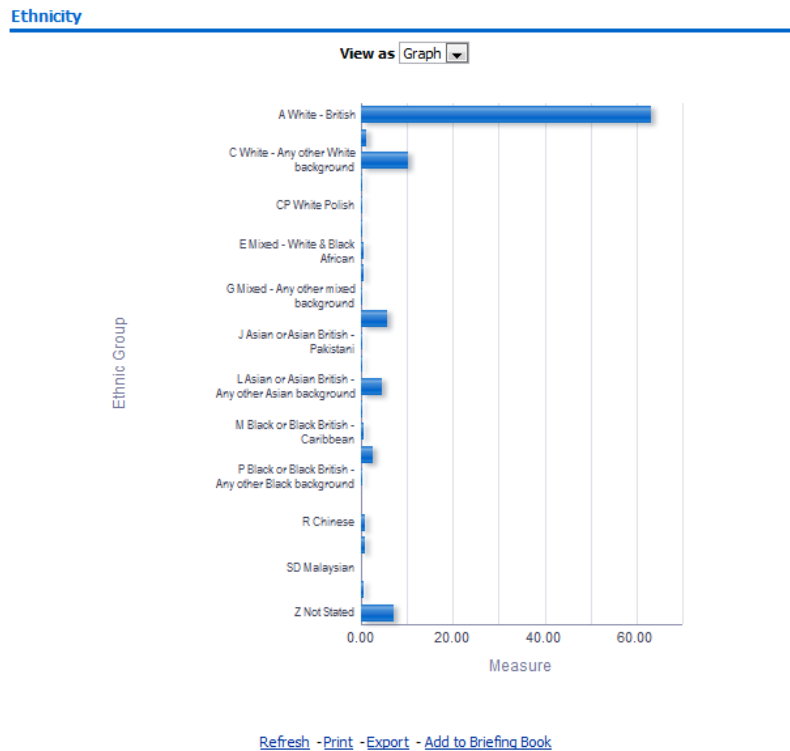
Actions

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
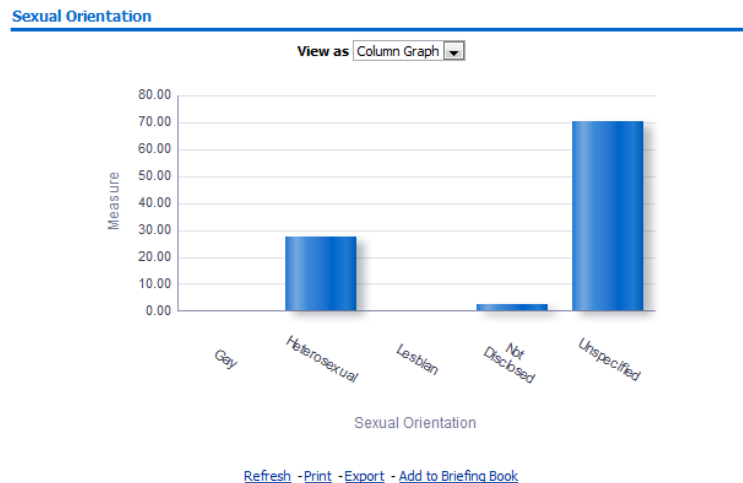
Actions

Click -> Diversity Detail Tab

Age Band

Description

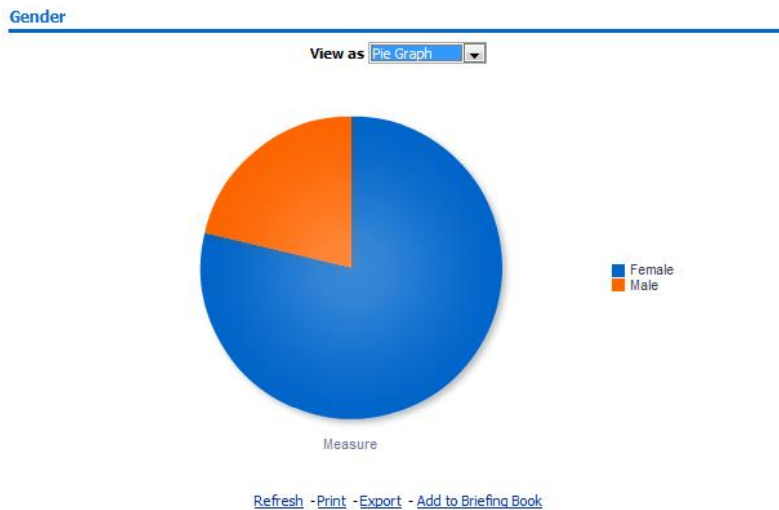This analysis is designed to show Headcount, % of Headcount and FTE grouped by Age Band.

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
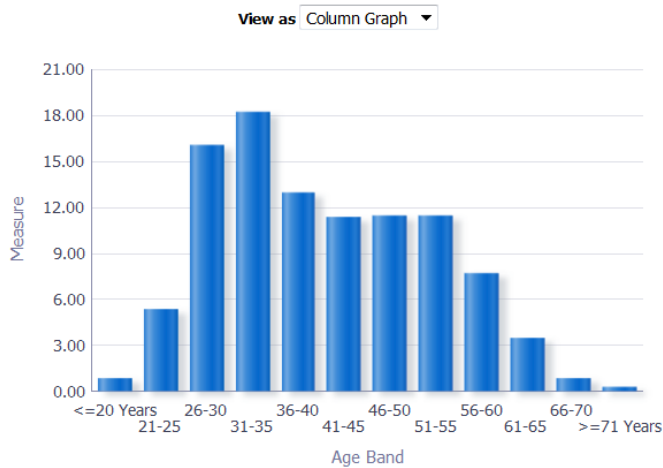
Actions

Click -> Diversity Detail Tab

Length of Service

Description

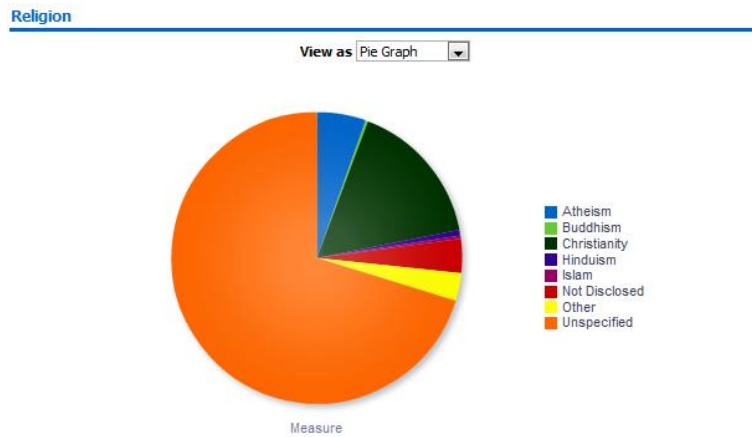This analysis is designed to show Headcount, % of Headcount and FTE grouped by Length of Service Band.

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
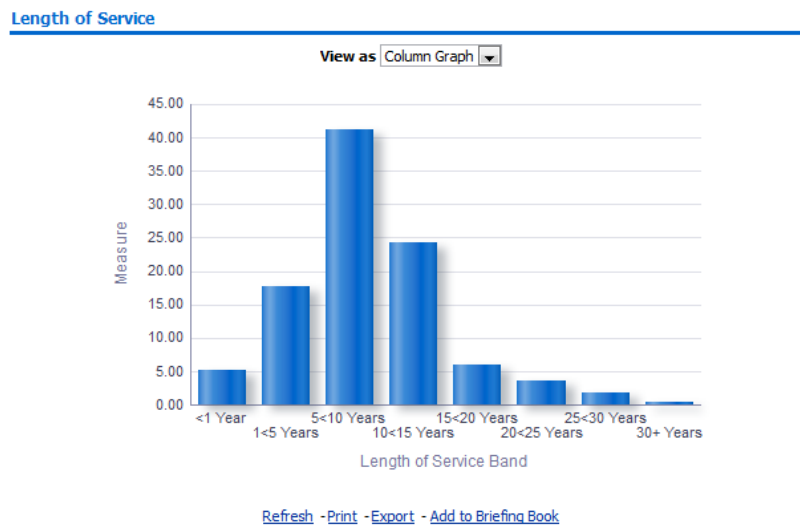
Actions

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
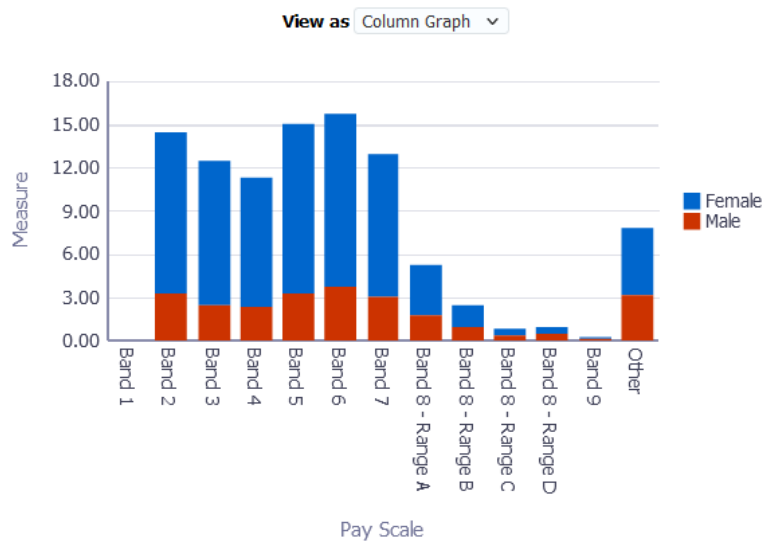
Employee Category

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
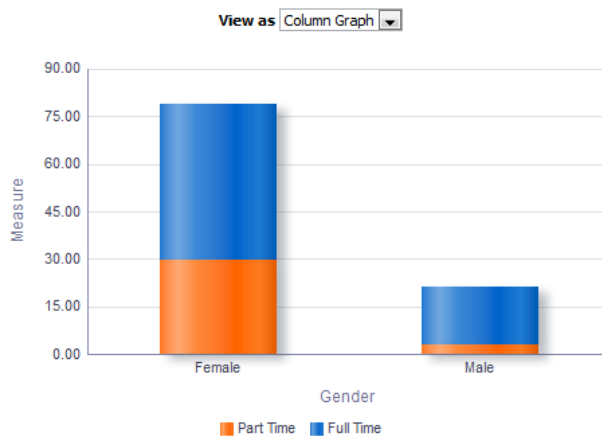
Actions

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
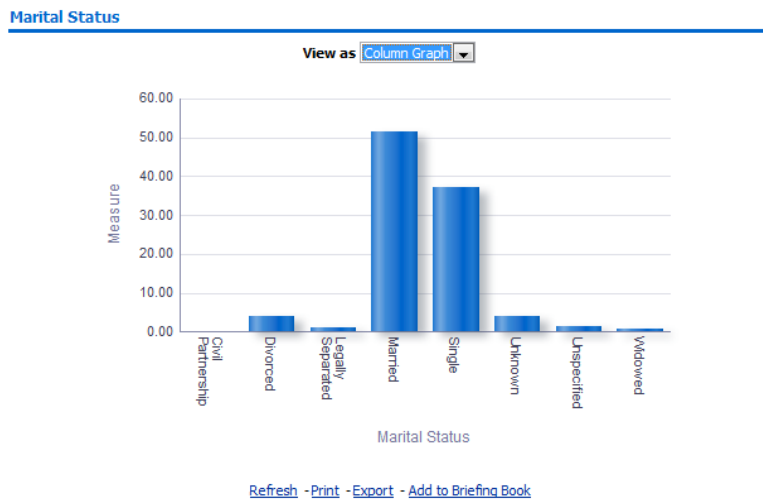
Actions

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
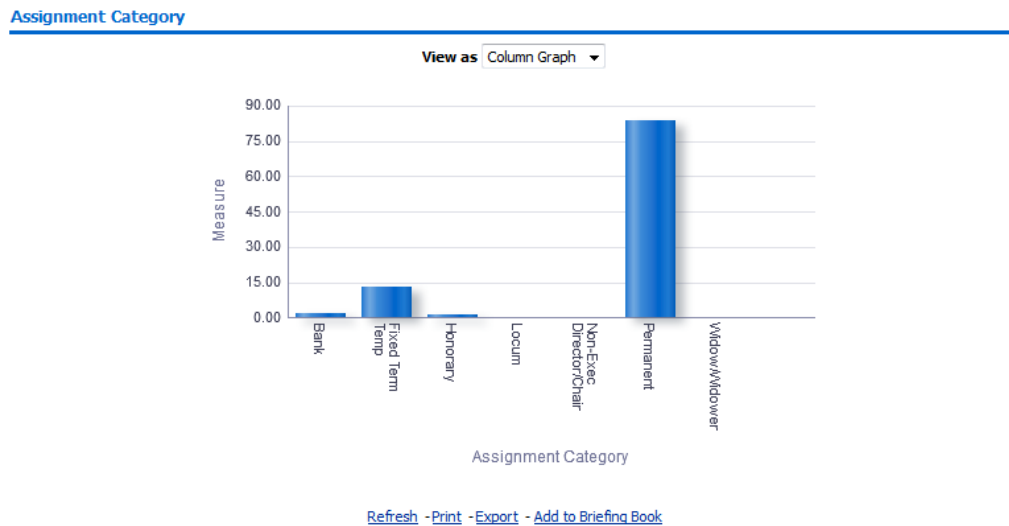
Actions

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
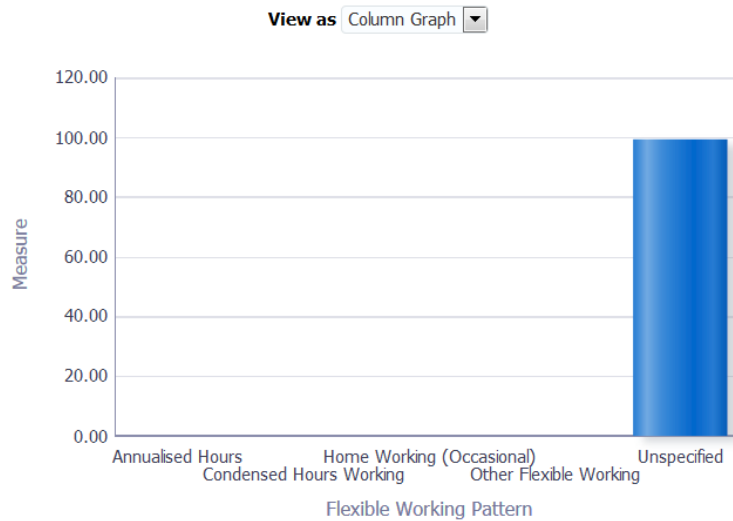
Nationality

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
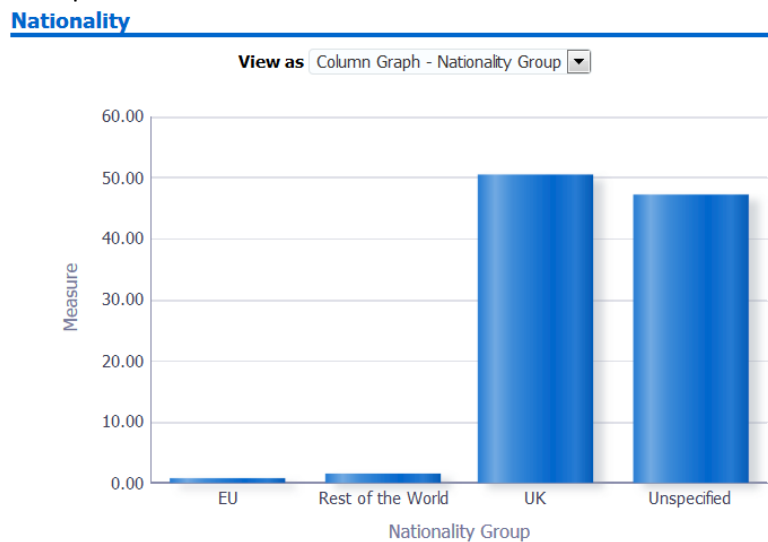
Diversity Detail Tab

Prompts

Length of Service Band

Age Band

Ethnic Origin

Gender

Disability

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

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

Group by   Staff Group

	1,612		12
	Headcount		Retirements

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%
Grand Total	**1,612**	**12**	**0.74%**	**3.11%**

Refresh - Print - Export - Add to Briefing Book

0.74%	3.11%
Retirement Rate	Retirement Rate (55 & Over)

Refresh - Print - Export - Add to Briefing Book

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
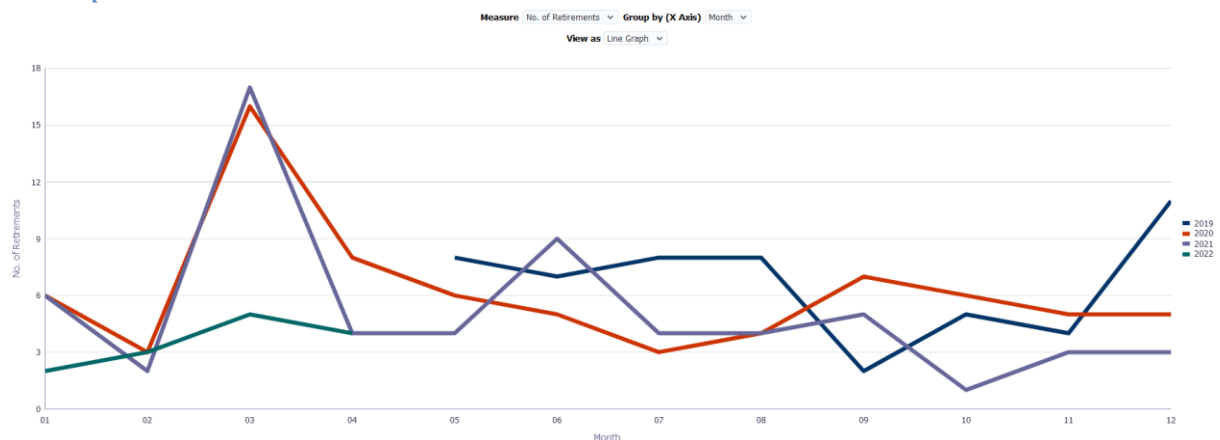
Retirements Due Tab

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
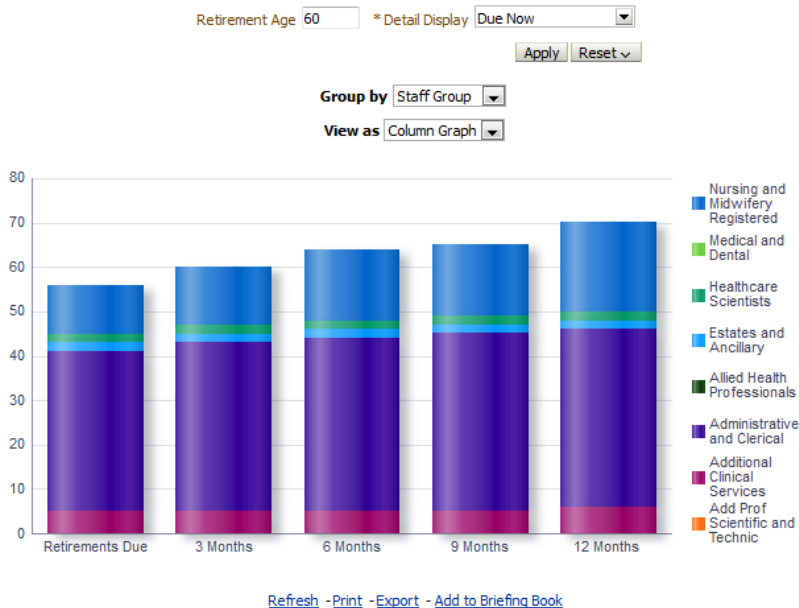
Retirements Due Detail

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
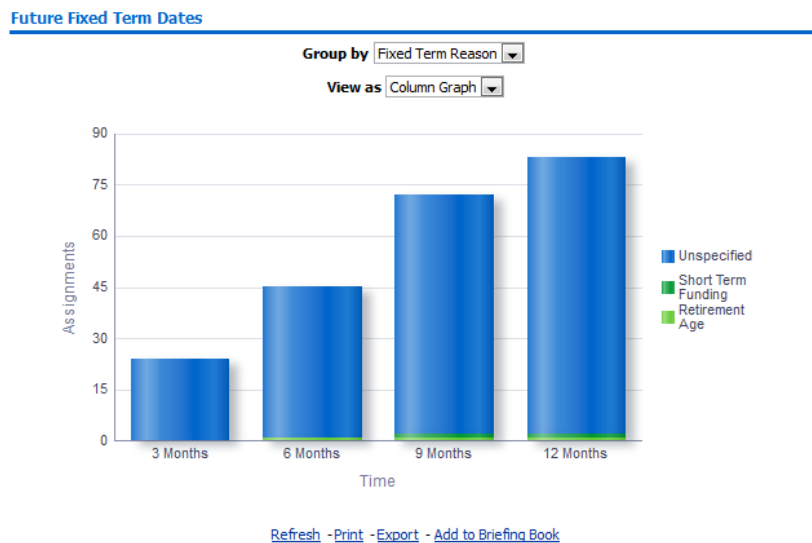
Fixed Term Problems Summary

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

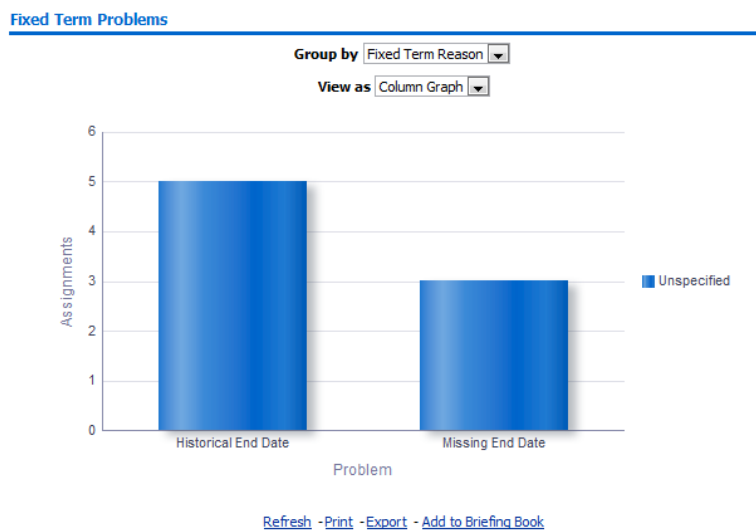Fixed Term End Date Between

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
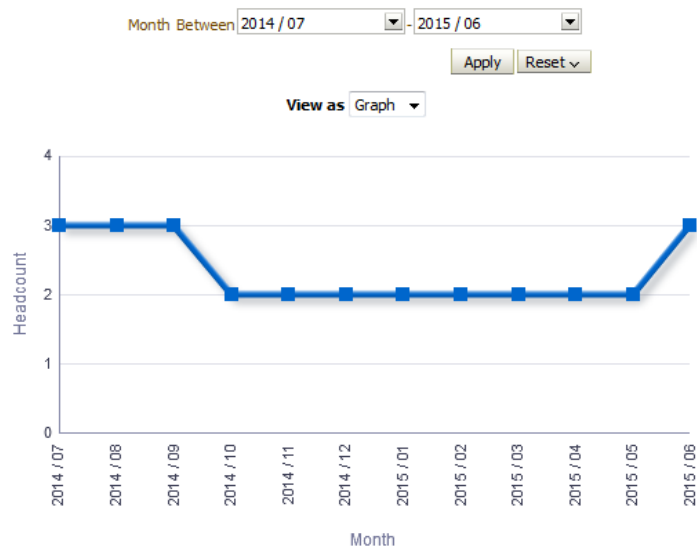
Overseas Employee Summary

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 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

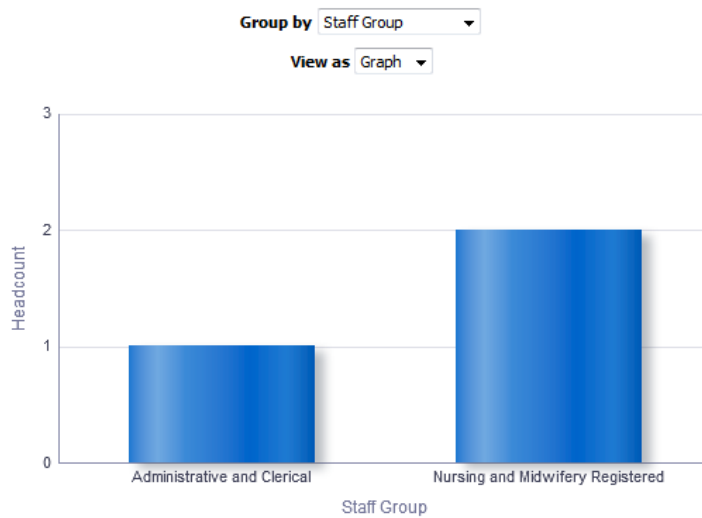| Employee Number	Last Name	First Name	Title	NI Number	FTE	Organisation	Staff Group	Recruitment Source	Country of Birth	Nationality	Position
20055417	007Lane	Sarah	Mrs.	WA504375A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278|Staff Nurse Band 5|N6A|Surgery|
20055651	007Lawrence	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	007Lewis	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	007Neville	Chrsitine	Mrs.	WA504230A	1.00	504 Ward 9	Nursing and Midwifery Registered	Abroad - Non-EU Country		Undefined	84278|Staff Nurse Band 5|N6A|Surgery|
20055459	007Smith	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	008Holloway	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	008Lawrence	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	008Lewis	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	008Smith	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	008Steele	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

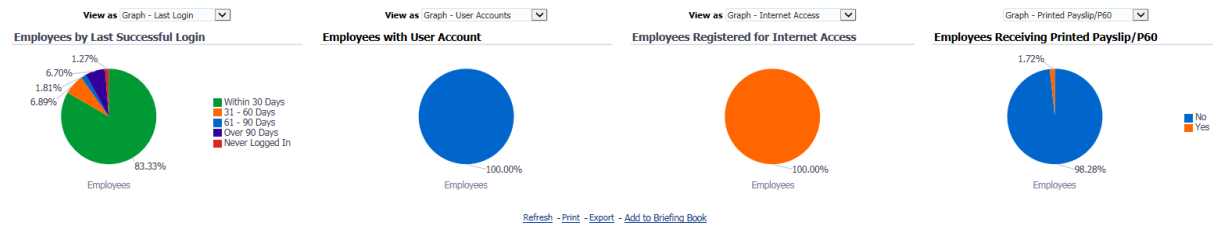*Description*

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	Recieve Printed Payslip/P60

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 40   Red From 48

Apply   Reset ▾

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)

Set Avg Hours Worked Amber From 40.01   Red From 48.01

Apply   Reset ▾

Group by Org L2 ▾ and Org L3 ▾ 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 Aministrators.

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

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.

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

Prompts

Effective Date
Influenza Date Between
Influenza Vaccination Type
Exclude Open Ended Absence - Start Date <=

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
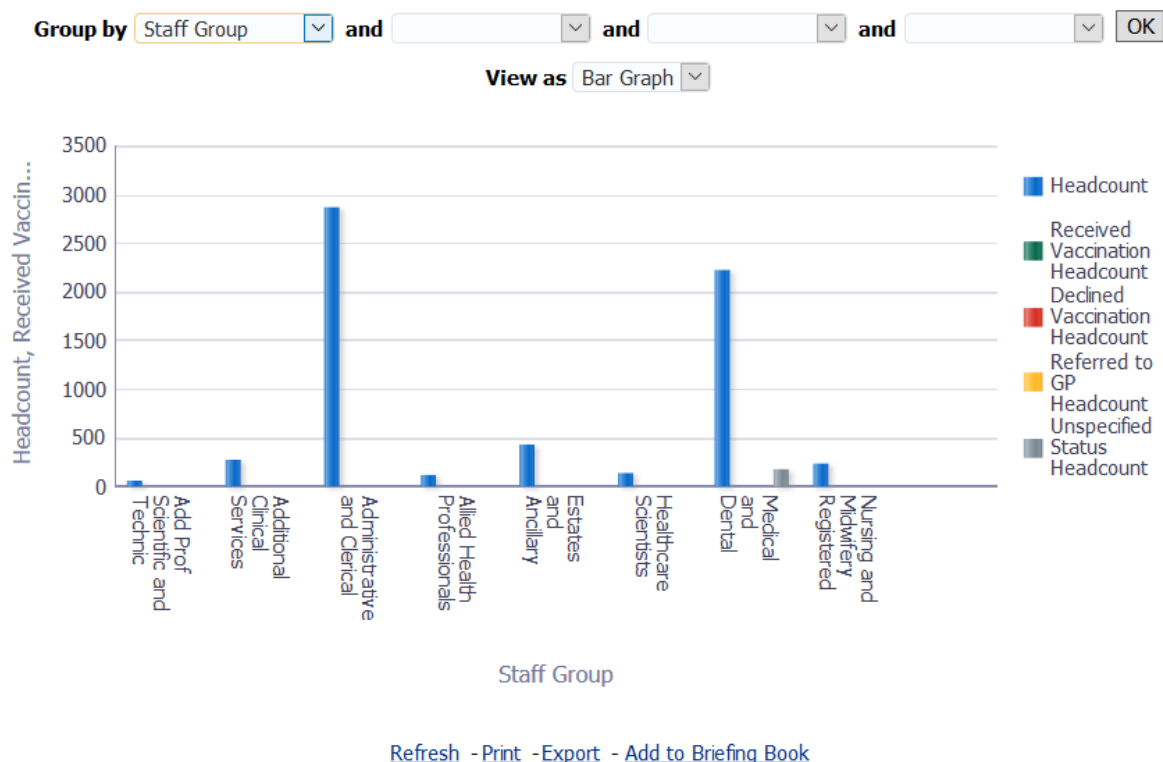
Flu Vaccinations Detail

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 StatusInfluenza 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)
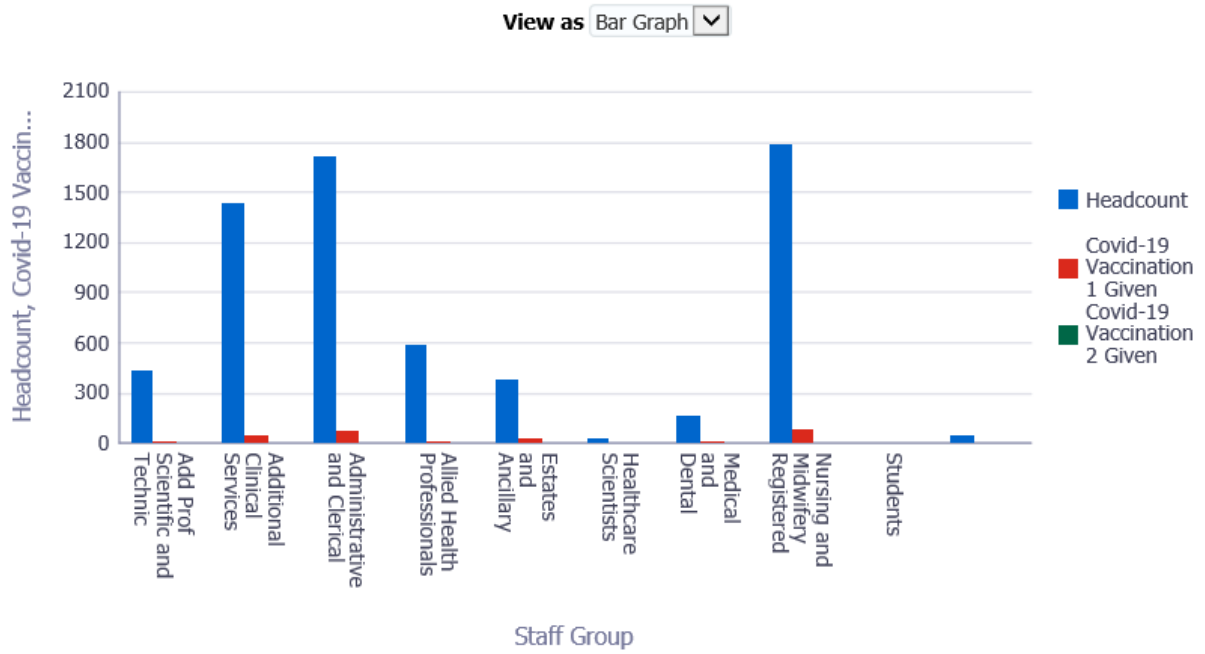

Column Selectors (Table View only)

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

View as Bar Graph ▼

Covid-19 Vaccinations Summary (Ongoing Maintenance)

Description

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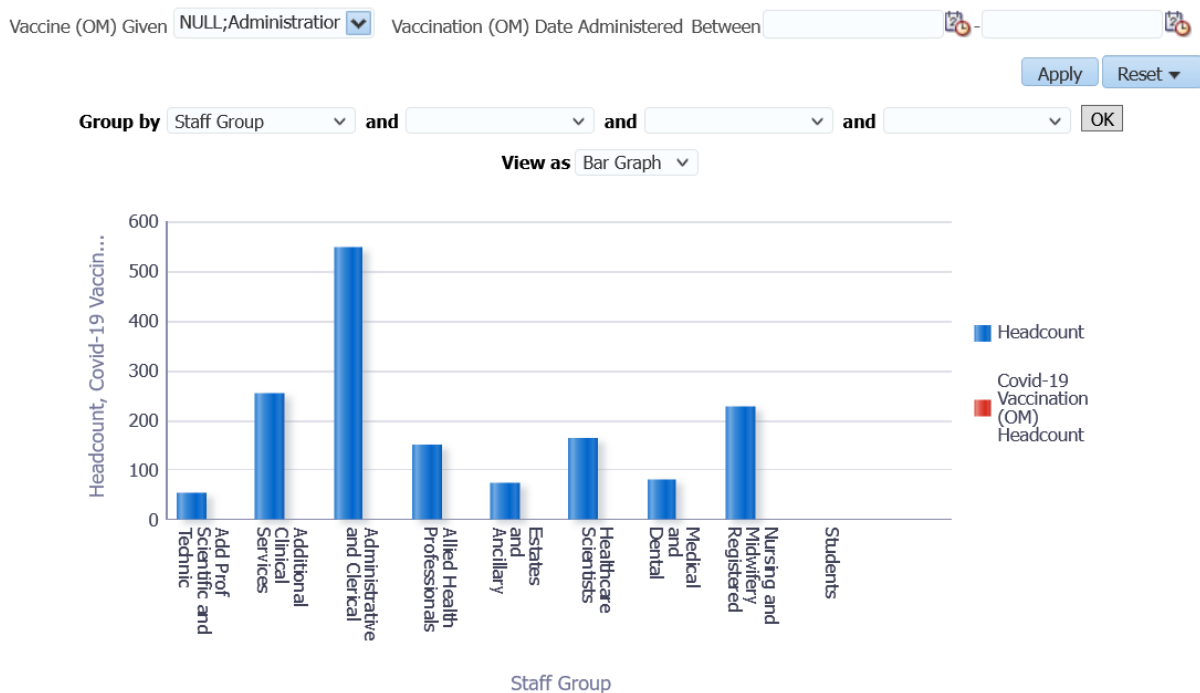
Column Selectors (Table View only)

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			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 Maintanance) 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	