

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0253 - GUIDE TO ESRBI ASSIGNMENT CHANGES DASHBOARD

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# DOCUMENT CONTROL

## CHANGE RECORD

Date	Author	Version	Change Reference
29/12/2016	Matt Madya	0.1	Initial Draft
08/02/2017	Matt Madya	1.0	Initial Release
04/07/2017	Matt Madya	2.0	Updated following new ESRBI developments
01/10/2018	Matt Madya	3.0	Updated following new ESRBI developments
26/07/2019	Matt Madya	4.0	Updated following new ESRBI developments
22/03/2021	Matt Madya	5.0	Annual Review
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27/10/2023	Matt Madya	7.0	Annual Review
01/03/2025	Matt Madya	8.0	Annual Review

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## DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

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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.

## Assignment Changes 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).

### *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  
XXX Payroll Audit  
XXX Payroll Super Administration

### *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

## Workforce Movements Tab

The Workforce Movements Tab provides intelligence on movements of staff within the organisation grouped by specific assignment details and assignment change reasons.

## Workforce Movements

### Description

This analysis is designed to show the movements of staff within the organisation, grouped by specific assignment details and assignment change reasons. Each item is checked against each day of the period, the assignment and change reason is returned and the change is highlighted in red.

### Data Items

Assignment Number	Incremental Date
Employee Name	FTE From
FTE To	Change Date
Change Reason	Pay Scale From
Pay Scale To	Assignment Status From
Assignment Status To	Position From
Position To	Organisation From
Organisation To	Job Role From
Job Role To	Staff Group From
Staff Group To	Location From
Location To	Last Updated By
Grade Step From	Last Updated Date
Grade Step To	

### View Selectors

None

### Prompts

Date From and To

Change Reason

Last Updated By

Last Updated Date

### Example Screenshot

NHS Electronic Staff Record - Business Intelligence



Note: Organisation filtering can be found by clicking the Next button within the upper Dashboard Prompt.

Organisation(s) (All Column Values) Staff Group(s) (All Column Values) Assignment Category (All Column Values) Assignment Status (All Column Values)

Person Type(s) Employee;Employee z Employee Person Type(s) (All Column Values) Primary Assignments Only --Select Occupation Code (All Column Values)

Employee Number(s) --Select Value-- Employee Location (All Column Values) Last Updated Date Between [Date] [Date]

Change Reason(s) --Select Value-- Last Updated By (All Column Values) Date From 01/07/2015 Date To 31/07/2015

Next Apply Reset

Assignment Number	Employee Name	Incremental Date	Last Updated By	Last Updated Date	FTE From	FTE To	Change Date	Change Reason	Pay Scale From	Pay Scale To	Assignment Status From	Assignment Status To
20055432	Ayres13, Mrs. Pamela		504TRAIN01 Leese01, Mrs. Vivian	12/08/2015	1.00	1.00	01/07/2015		XR06	XR06	Active Assignment	Maternity & Adoption

Refresh - Print - Export - Add to Briefing Book

## Promotions Summary Tab

This dashboard produces the number of 'Promotions' that have occurred during a given period.

A promotion is defined as an assignment which is updated with one of the following change reasons:

- Promotion
- Promotion within Grade
- Promotion to Higher Grade
- Promotion and Transfer

As well as having one of these change reasons, the assignment must have been updated with at least one of the following:

- Payscale
- Assignment Status
- Position
- Organisation
- Location
- Supervisor

### *Prompts*

Date From

Date To

## Age Band

### Description

This analysis is designed to show the number of Promotions between a prompted date range and grouped by Age Band.

### Data Items

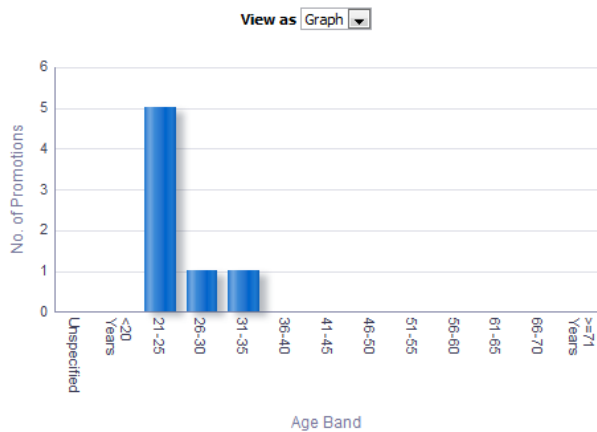
Title	Description
Age Band	Age Band Data Item
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot

#### Age Band



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



## Gender

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Gender.

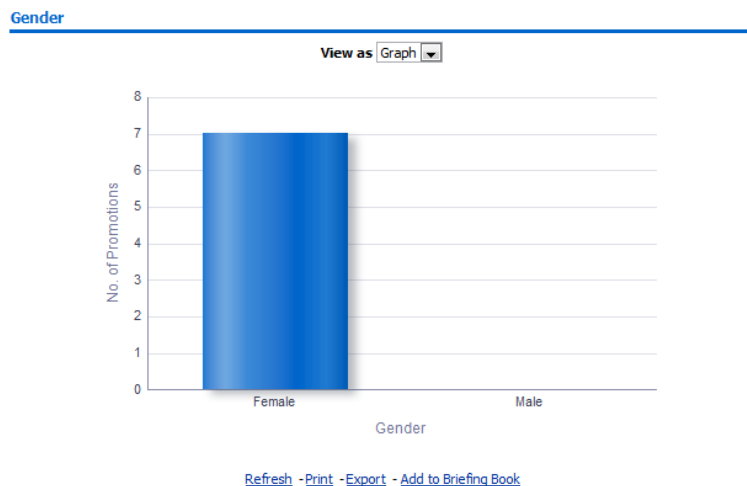
### Data Items

Title	Description
Gender	Gender against the Employee Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Ethnic Origin

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Ethnic Origin.

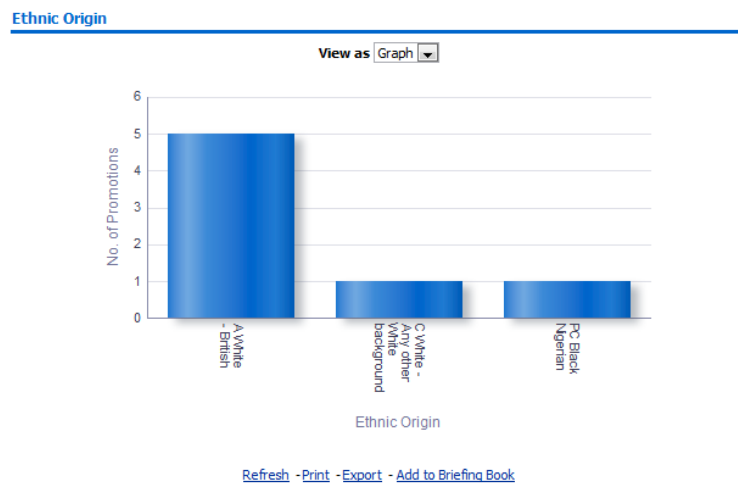
### Data Items

Title	Description
Ethnic Origin	Ethnic Origin against the Employee Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Disability

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Disability.

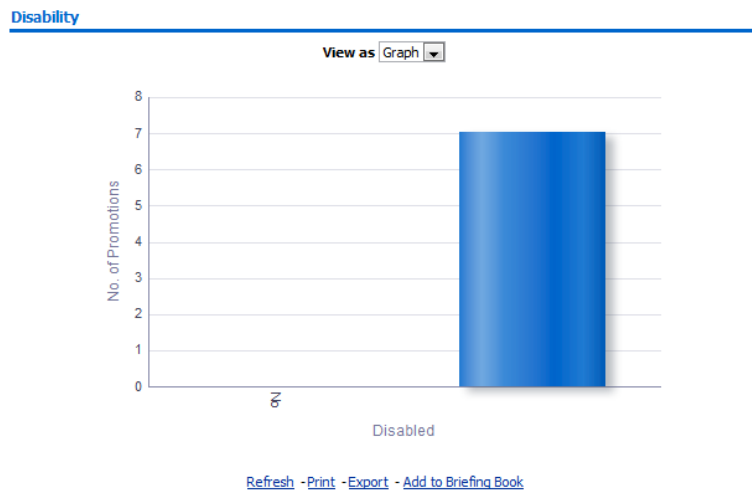
### Data Items

Title	Description
Disability	Disability against the Employee Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Staff Group

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Staff Group.

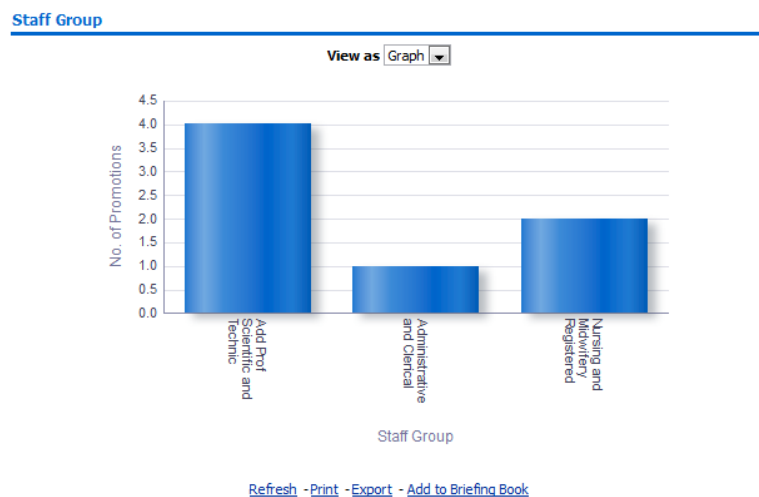
### Data Items

Title	Description
Staff Group	Staff Group against the Assignment Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Religious Belief

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Religious Belief.

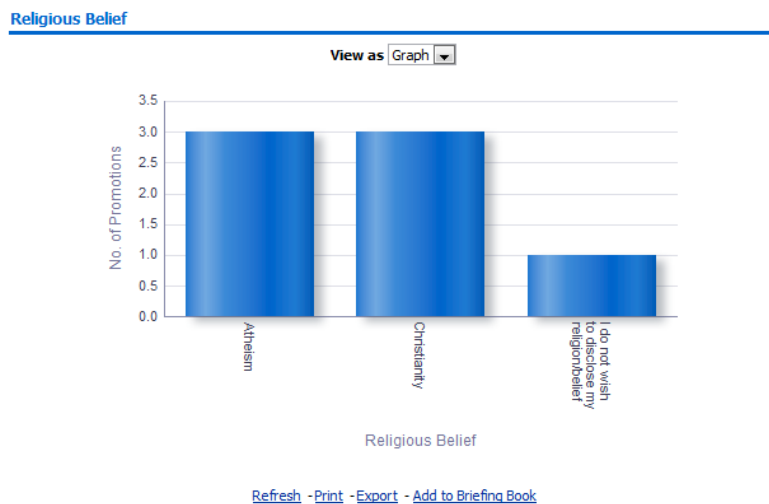
### Data Items

Title	Description
Religious Belief	Religious Belief against the Employee Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Sexual Orientation

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Sexual Orientation.

### Data Items

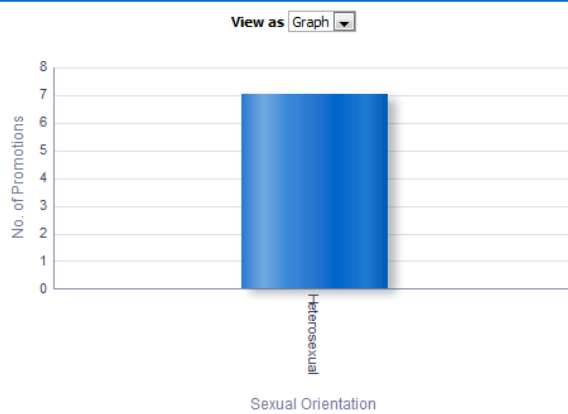
Title	Description
Sexual Orientation	Sexual Orientation against the Employee Record
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot

#### Sexual Orientation



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

## Pay Band

### Description

This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Pay Band.

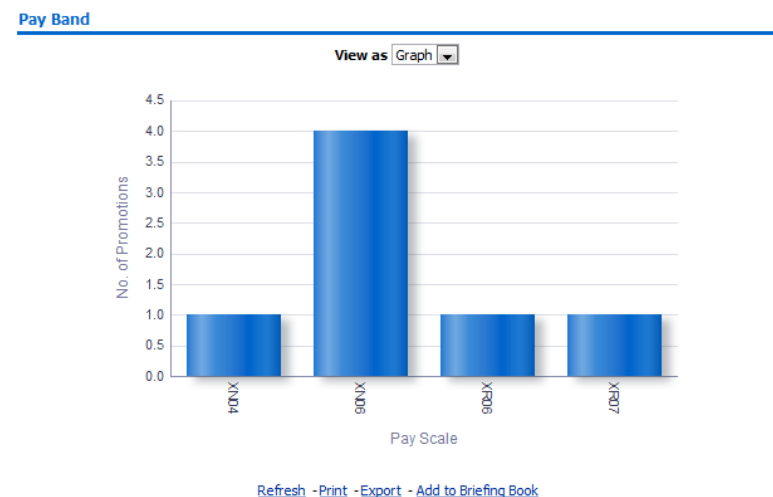
### Data Items

Title	Description
Pay Band	
FTE	
Number of Promotions	Custom Formula

### View Selectors

View as Column Graph or Table (Default Column Graph)

### Example Screenshot



## Promotions Detail Tab

### Prompts

Date From

Date To

## Promotions Detail

### Description

This analysis provides a detail view at employee level of a range of employee and assignment data items for 'Promotions' that have occurred during a given period.

### Data Items

Assignment Number	Pay Scale Moved From
Employee Name	Pay Scale Moved To
Age	Position Moved From
FTE	Position Moved To
Length of Service (Months)	Organisation Moved From
Ethnic Origin	Organisation Moved To
Gender	Job Role Moved From
Disability	Job Role Moved To
Promotion Date	Staff Group Moved From
Change Reason	Staff Group Moved To
Supervisor Moved From	Supervisor Moved To

### Example Screenshot

Assignment Number	Employee Name	Age	FTE	Length of Service (Months)	Ethnic Origin	Gender	Promotion Date	Change Reason	Payscale Moved From	Pay Scale Moved To	Position Moved From	Position Moved To	Organisation Moved From	Organisation Moved To	Job Role Moved From	Job Role Moved To	Staff Group Moved From
12345678	Blogs, Mr. Joe	23.0	1.00	7	A White - British	Female	06/12/2016	Promotion	XWAB	XWAC	10002000 Account Payable Officer E2A Purchasing and Supplies	11002200 Account Payable Team Leader E2A Purchasing and Supplies	504 D504 ESRCT Account Payable North Warwick	504 D504 ESRCT Account Payable North Warwick	Officer	Officer	Administrative and Clerical
12345678	Blogs, Mr. Joe	24.0	1.00	39	A White - British	Female	01/12/2016	Promotion	XR05	XR06	10002000 Account Payable Officer E2A Purchasing and Supplies	11002200 Account Payable Team Leader E2A Purchasing and Supplies	504 D504 ESRCT Account Payable North Warwick	504 D504 ESRCT Account Payable North Warwick	Radiographer - Therapeutic	Radiographer - Therapeutic	Allied Health Professionals
12345678	Blogs, Mr. Joe	29.0	1.00	96	A White - British	Male	01/12/2016	Promotion	XR06	XR07	10002000 Account Payable Officer E2A Purchasing and Supplies	11002200 Account Payable Team Leader E2A Purchasing and Supplies	504 D504 ESRCT Account Payable North Warwick	504 D504 ESRCT Account Payable North Warwick	Radiographer - Therapeutic	Radiographer - Therapeutic	Allied Health Professionals
12345678	Blogs, Mr. Joe	30.0	1.00	136	A White - British	Female	12/12/2016	Promotion	XN05	XN06	10002000 Account Payable Officer E2A Purchasing and Supplies	11002200 Account Payable Team Leader E2A Purchasing and Supplies	504 D504 ESRCT Account Payable North Warwick	504 D504 ESRCT Account Payable North Warwick	Officer	Officer	Administrative and Clerical

## Bank to Substantive Tab

The Bank to Substantive Tab is designed to monitor the assignment categories of staff and return those that change from 'Bank' to 'Substantive' or any other combination during the period.



## Bank to Substantive

### Description

This analysis is designed to monitor the assignment categories of staff and return those that change from 'Bank' to 'Substantive' or any other combination during the period. 'Bank' is defined as any assignments with an Assignment Category of 'Bank', 'Substantive' is defined as any other assignment category (including null).

### Data Items

Employee Number	Name
Date	From
To	Previous Position
New Position	Previous Organisation
New Organisation	Previous Staff Group
New Staff Group	Previous FTE
New FTE	

### View Selectors

None

### Prompts

Date From and To

### Example Screenshot

Employee	Name	From	To	Previous Position(s)	New Position(s)	Previous Organisation(s)	New Organisation(s)	Previous FTE	New FTE
20055417	007Lane, Mrs. Sarah	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055651	007Lawrence, Mrs. Mary	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055462	007Lewis, Miss Sarah	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055290	007Neville, Mrs. Christine	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055459	007Smith, Mr. Ben	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055550	008Holloway, Mr. Simon	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055247	008Lawrence, Mrs. Mary	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055561	008Lewis, Miss Sarah	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055577	008Smith, Mr. Ben	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20055529	008Steele, Mrs. Kerry	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20095269	320, Miss Monica	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00
20095048	320, Mrs. Neela	Substantive Only	Bank and Substantive	Old Test Position	Test Position	Test Organisation	Test Organisation	1.00	1.00

## Employee Update Tab

### Description

This analysis provides users with information in order to gain details on the attributes of employees during a given period. Please note that this analysis does not include leaver records. For a list of leavers, please use the NHS Staff Movements Dashboard.

### Prompts

Organization Name

Staff Group

Assignment Category

Assignment Status

Person Type

Employee Person Type

Employee Number

Primary Assignment Flag

Period Start Date

Period End Date

### Data Items

Record Status	Address1 Line2
Legacy Payroll	Address1 Line3
Last Name	Town
First Name	County
Middle Name	Post Code
Initials	Home Telephone Number
Title	Disabled
National Insurance Number	Previous Employer
Employee Category	CSD 3 Months
Start Date	CSD 12 Months
Assignment Number	Contact Relationship
Organisation	Contact Address Line 1
Staff Group	Contact Address Line 2
Marital Status	Contact Address Line 3
Gender	Contact Town
Birth Date	Contact County
Maiden Name	Contact Post Code
Ethnic Origin	Contact Phone Number
Country of Birth	TUPE Transfer
Address1 Line1	

### Example Screenshot

Record Status	Legacy Payroll	Last Name	First Name	Middle Name	Initials	Title	National Insurance Number	Employee Category	Start Date	Assignment Number	Organisation	Staff Group	Marital Status	Gender	Birth Date	Maiden Name	Ethnic Origin	Country of Birth	Address1 Line1	Address1 Line2
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Divorced	Male	12-Jun-1977	Blogger	SE Other Specified		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Divorced	Male	12-Jun-1977	Blogger	SE Other Specified		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Divorced	Male	12-Jun-1977	Blogger	SE Other Specified		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Married	Male	20-Dec-1970	Blogger	Undefined		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Married	Male	23-Nov-1958	Blogger	A White - British		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Married	Male	23-Nov-1958	Blogger	A White - British		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Married	Male	23-Nov-1958	Blogger	A White - British		0 Popular Drive	
Changes	10002000	Blogs	Joe		J	Mr	NH101010B	Full Time	07/03/2011	12345678	000 NHS ESR Organisation	Administrative and Clerical	Married	Male	23-Nov-1958	Blogger	A White - British		0 Popular Drive	