NHS ELECTRONIC STAFF RECORD

ESR-NHS0253 - GUIDE TO ESRBI ASSIGNMENT CHANGES DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
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Approvals:

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DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
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
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22/03/2021	Matt Madya	5.0	Annual Review
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27/10/2023	Matt Madya	7.0	Annual Review

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DISTRIBUTION

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2		

CONTENTS

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

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

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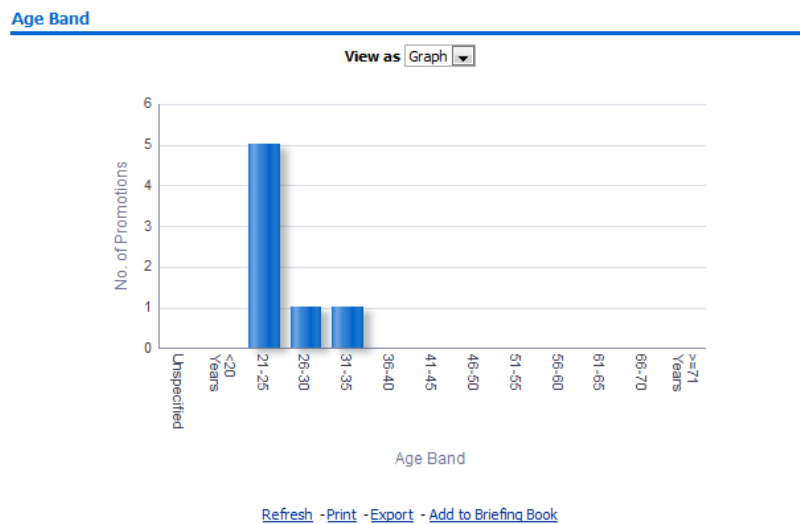
Title	Description
Ethnic Origin	Ethnic Origin against the Employee Record
FTE	
Number of Promotions	Custom Formula

View Selectors

View as Column Graph or Table (Default Column Graph)

Example Screenshot

Disability

Description

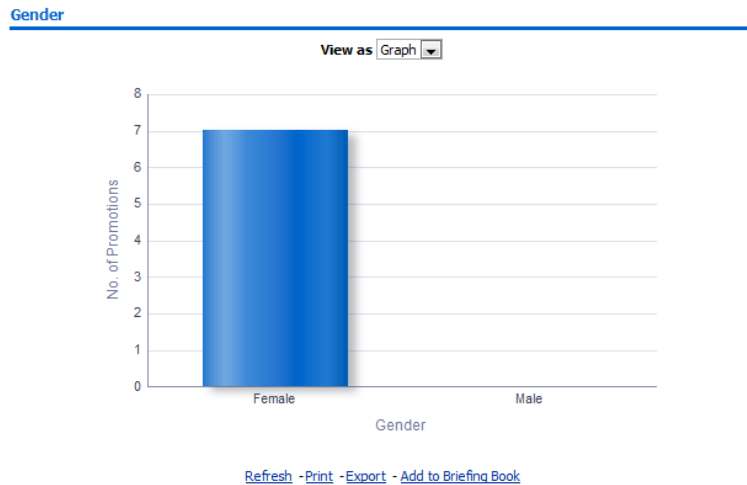This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Disability.

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.

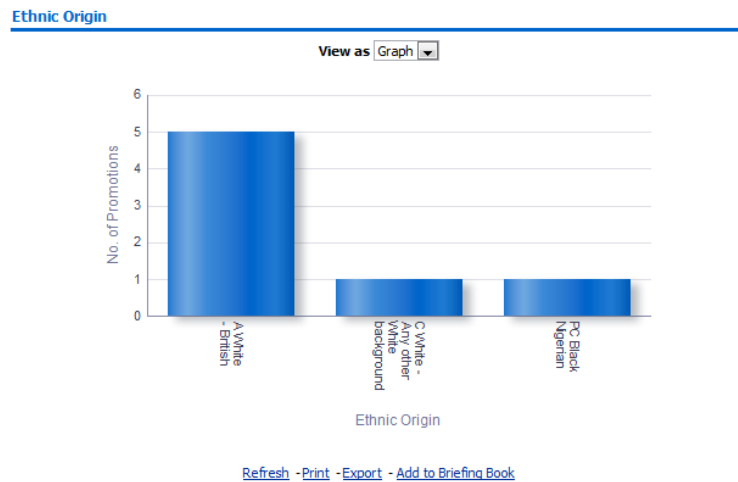*Data Items*

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

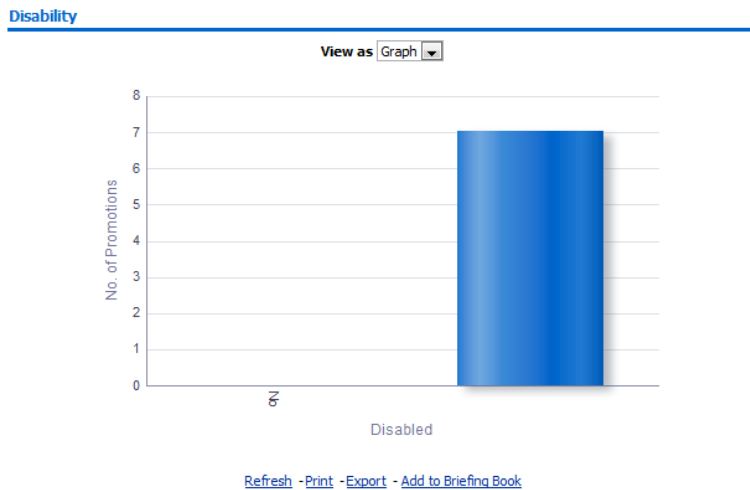This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Sexual Orientation.

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

Pay Band

Description

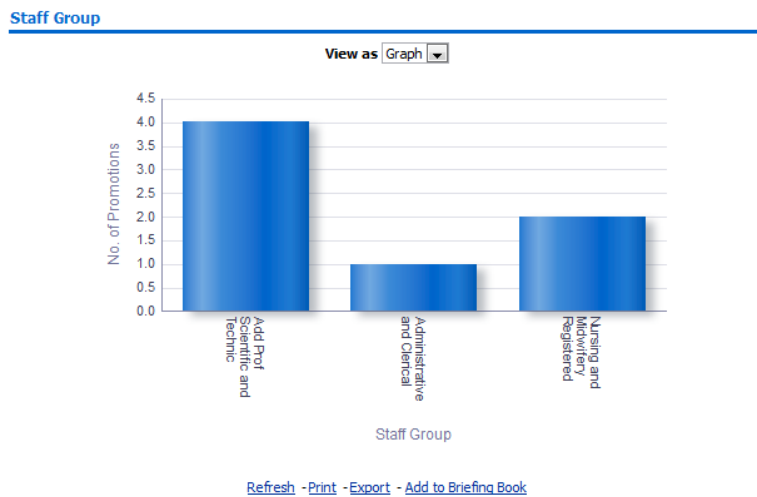This analysis is designed to show the number of Promotions and FTE between a prompted date range and grouped by Pay Band.

Data Items

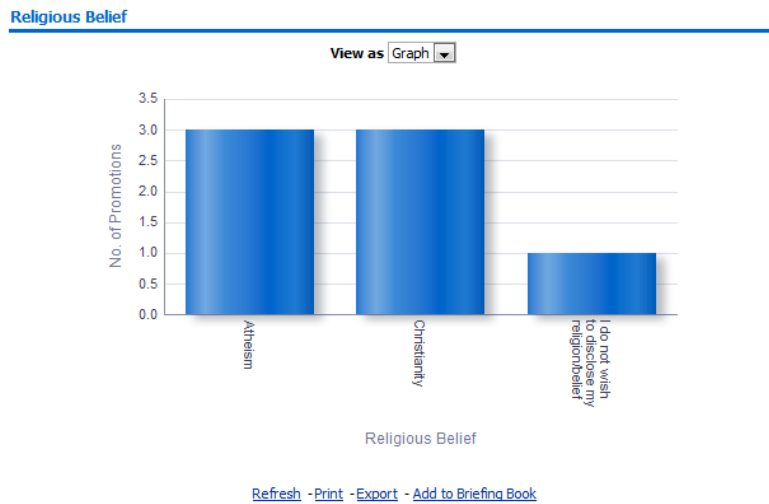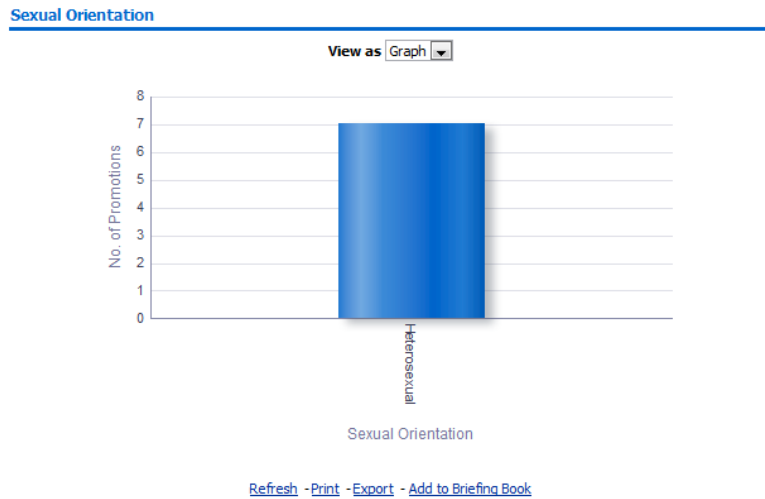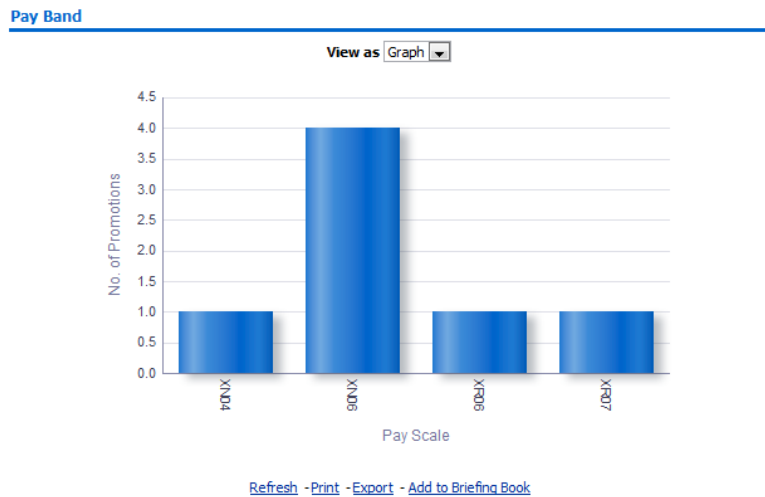| Title	Description
Pay Band	
FTE	
Number of Promotions	Custom Formula

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. Chrsitine	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	