

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0256 - GUIDE TO ESRBI STAFF MOVEMENTS MONITORING DASHBOARD

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# DOCUMENT CONTROL

## CHANGE RECORD

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29/12/2016	Matt Madya	0.1	Initial Draft
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14/01/2019	Matt Madya	2.0	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.

## **Staff Movements Monitoring Dashboard**

### *Description*

This dashboard is designed to provide users with intelligence on the movements of staff within the organisation.

### *Allocation*

This dashboard is available to the following URPs:

XXX BI Administration  
XXX HR Administration  
XXX HR Administration (With RA)  
XXX HR Management  
XXX Finance Reporting  
XXX Finance Reporting and Hub Mapping

Note: Exit Questionnaire analyses are not available to Finance URPs.

### **Monitoring Tab**

The monitoring tab of the Staff Movements Dashboard provides Starters and Leavers information grouped by a range of protected characteristics.

## Starters and Leavers Headcount and FTE by Age Band, Length of Service, Recruitment Source, Disability, Religious Belief, Ethnic Origin, Nationality, Gender, Pay Grade and Sexual Orientation.

### Description

This group of analyses shows Starters and Leavers Headcount and FTE by each of the following protected characteristics: Age Band, Length of Service, Recruitment Source, Disability, Religious Belief, Ethnic Origin, Nationality, Gender and Sexual Orientation.

### Data Items

Starters Headcount	Leavers Headcount
Starters FTE	Leavers FTE
Gender	Age Band
Religious Belief	Disability
Length of Service	Recruitment Source
Ethnic Origin	Sexual Orientation
Pay Grade	Nationality

### Dashboard Prompt

Leavers Headcount (default)

Leavers FTE

Starters Headcount

Starters FTE

LTR Headcount

LTR FTE %

### View Selector

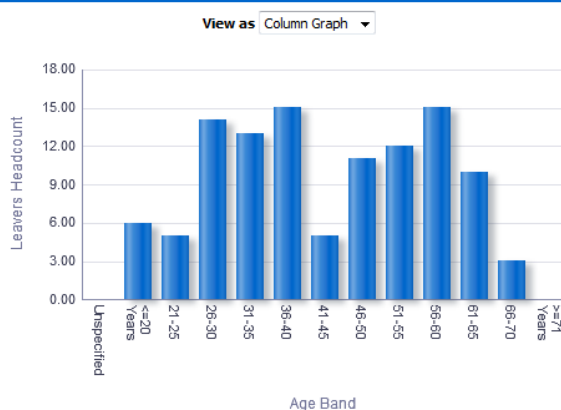
Bar Graph (default)

Pie Graph

Pivot Table

### Example Screenshot

by Age Band



### Actions

None

## Length of Service Monitoring Tab

The Length of Service Monitoring tab of the Staff Movements Dashboards provides Average Length of Service information grouped by a range of protected characteristics. Length of Service is defined by the Employee Latest Start Date so in the case of these analyses, Length of Service refers to the Length of Service at the current organisation rather than Length of NHS Service.

### *Prompts*

Organisation(s)

Staff Group

Assignment Category

Occupation Code

Employee Category

Person Type

Employee Person Type

Effective Date (default: Current Date)

Job Role

## Average Length of Service Monitoring by Age Band, Disability, Religious Belief, Ethnic Origin, Gender and Sexual Orientation.

### Description

These group of analyses show Average Length of Service by each of the following protected characteristics: Age Band, Disability, Religious Belief, Ethnic Origin, Gender and Sexual Orientation.

### Data Items

Avg Length of Service (Yrs)	
Gender	Age Band
Religious Belief	Disability
Ethnic Origin	Sexual Orientation

### Dashboard Prompt

None

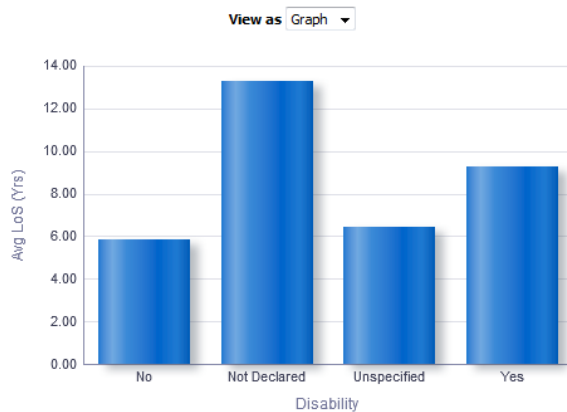
### View Selector

Bar Graph (default)

Table

### Example Screenshot

by Disability



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



## Exit Questionnaire Tab

The Exit Questionnaire tab of the NHS Staff Movements Dashboards provides a summary analysis based on Exit Questionnaire results entered in ESR. It can be viewed as a column graph, a radar graph or a pivot table.

### *Prompts*

Staff Group

Person Type

Assignment Category

Job Role

Date Between

## Exit Questionnaire Summary

### Description

This analysis provides a count and a percentage of Leavers / Terminate Process Assignments within the date period defined in the prompt.

### Groupings

Org Level 1-13  
Leaving Reason  
Destination of Leaving  
Length of Service Band  
Occupation Code  
Job Role  
Pay Grade

### Data Items

Title	Description
Leavers	Count of Leavers who have / have not completed an Exit Questionnaire in the period
Leavers %	Percentage of Leavers who have / have not completed an Exit Questionnaire in the period
Terminate Process Assignments	Count of Terminate Process Assignments that have / have not completed an Exit Questionnaire in the period
Terminate Process Assignments %	Percentage of Terminate Process Assignments that have / have not completed an Exit Questionnaire in the period

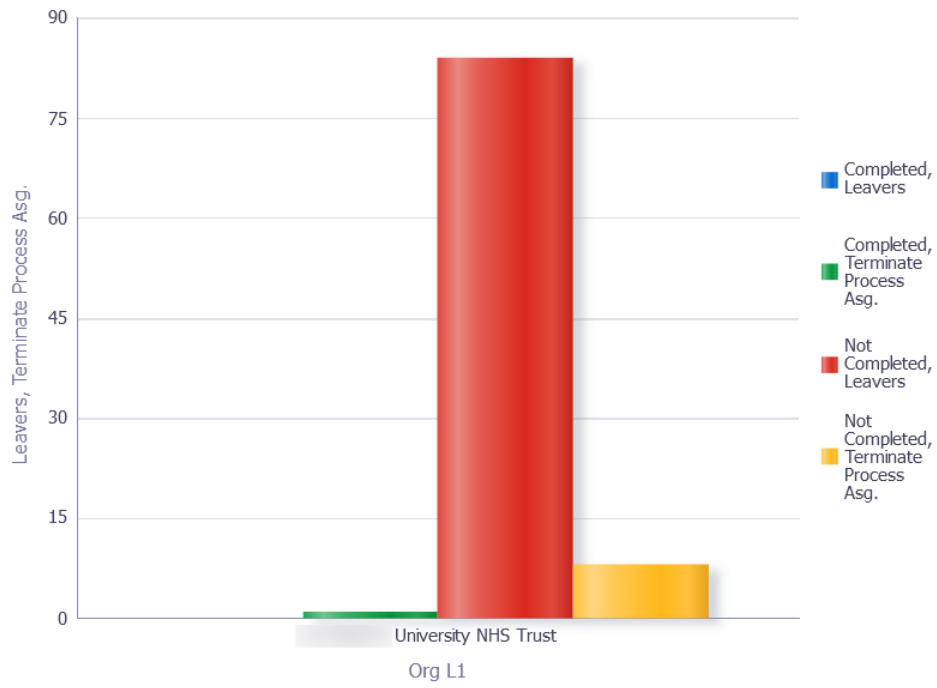
### View Selector

Bar Graph (default)  
Pie Chart  
Pivot Table

### Example Screenshot

Group by Org L1

View as Column Graph



## Exit Questionnaire Results

### Description

This analysis provides a count and a percentage for each of the five questionnaire responses for each of the exit questionnaire questions.

### Data Items

Question	Count of Responses
Percentage	Response

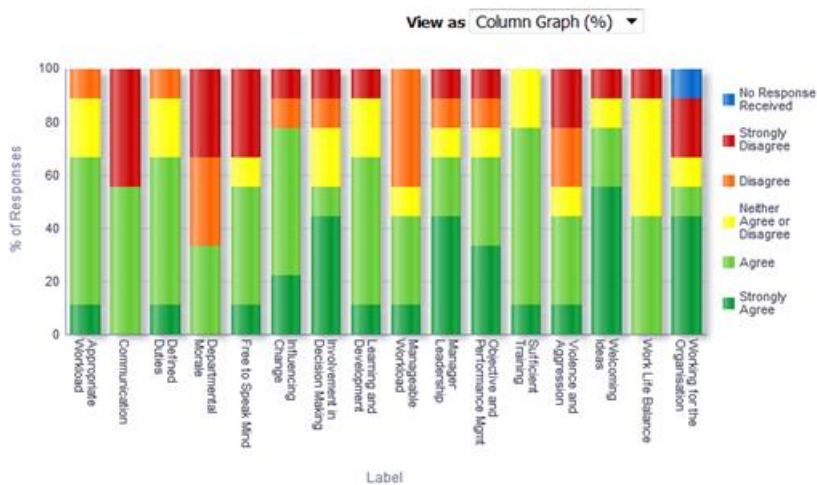
### View Selector

Bar Graph (default)

Radar Graph

Pivot Table

### Example Screenshot



## Exit Questionnaire Detail Tab

The Exit Questionnaire Detail tab of the NHS Staff Movements Dashboards provides a detail view based on Exit Questionnaire results entered in ESR.

### *Prompts*

Staff Group

Person Type

Assignment Category

Job Role

Date Between

Include Terminate Process Assignments (Yes or No: Default)

## Exit Questionnaire Details

### Description

This analysis provides a detail view of Exit Questionnaire information entered into ESR.

### Column Selectors

Org Level 1-13

### Data Items

Date Created	Defined Duties
Org Level 1-13	Appropriate Workload
Staff Group	Departmental Morale
Job Role	Working for the Organisation
Ethnic Origin	Leaving Reason
Age Band	Influencing Change
Nationality	Violence and Aggression
Gender	Involvement in Decision Making
Disability	Free to Speak Mind
Religious Belief	Work Life Balance
Sexual Orientation	Objective and Performance Management
Assignment Status	Sufficient Training
Pay Grade	Manageable Workload
Assignment Category	Manager Leadership
Influencing Change	Additional Comments
Welcoming Ideas	Leaving Month
Communication	
Learning and Development	

### Example Screenshot

Date Created	Violence and Aggression	Influencing Change	Involvement in Decision Making	Welcoming Ideas	Free to Speak Mind	Communication	Work Life Balance	Learning and Development	Objective and Performance Mgmt	Defined Duties	Sufficient Training	Appropriate Workload
13/03/2012	Agree	Agree	Agree	Agree	Disagree	Disagree	Neither Agree or Disagree	Neither Agree or Disagree	Agree			
31/12/2007	Strongly Agree	Neither Agree or Disagree	Neither Agree or Disagree	Neither Agree or Disagree	Disagree	Agree	Agree	Agree	Disagree			

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

## Exit Questionnaire Analysis Tab

### Description

This page of the dashboard contains a number of summary and detail analyses which can be used to analyse exit Questionnaire completions and Questionnaire scores.

### Prompts

Staff Group  
 Role  
 Person Type  
 Assignment Category  
 Date Between

## Exit Questionnaire Completions Analysis

### Description

This analysis returns the number and percentage of Exit Questionnaire completions over a period of time and is presented in both summary and detail views, grouped by month and a range of workforce fields.

### View Selector (Summary)

Completions Timeline (Default)

Leavers Timeline

Terminate Process Assignment Timeline

### Column Selector (Detail)

Organisation Level 1-13

Role

Staff Group

Leaving Reason

Destination on Leaving

Occupation Code

Pay Grade

Age Band

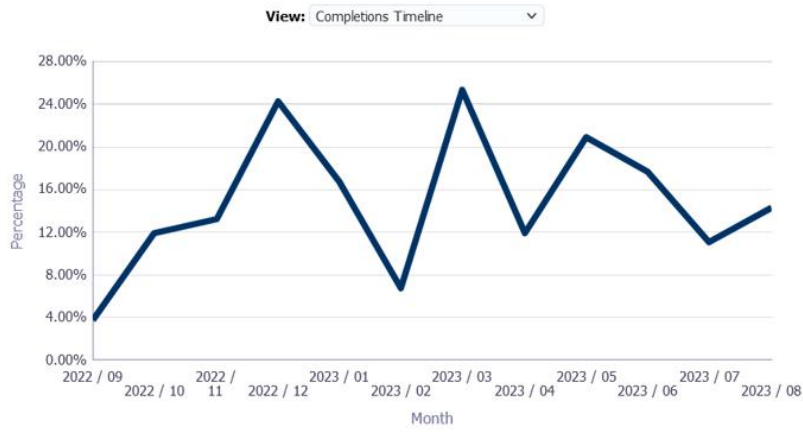
Length of Service Band

Various Protected Characteristics

### Data Items

Detail:	Summary:
Month	Month
Org Level 1-13	Timeline Completion %
Leaver Completions	
Leavers	
% Leaver Completions	
Terminate Process Assignment Completions	
Terminate Process Assignment	
% Terminate Process Assignment Completions	
% All Completions	

### Example Screenshot



Group by: Org L1

Month	Org L1	Leaver Completions	Leavers	% Leaver Completions	Terminate Process Asg. Completions	Terminate Process Asg.	% Terminate Process Asg. Completions	% All Completions
2022 / 09	000 NHS Organisation	4	94	4.26%	0	12	0.00%	3.77%
2022 / 10	000 NHS Organisation	5	37	13.51%	3	30	10.00%	11.94%
2022 / 11	000 NHS Organisation	2	29	6.90%	5	24	20.83%	13.21%
2022 / 12	000 NHS Organisation	10	43	23.26%	7	27	25.93%	24.29%
2023 / 01	000 NHS Organisation	3	45	6.67%	20	93	21.51%	16.67%
2023 / 02	000 NHS Organisation	3	40	7.50%	1	19	5.26%	6.78%
2023 / 03	000 NHS Organisation	13	52	25.00%	5	19	26.32%	25.35%
2023 / 04	000 NHS Organisation	4	35	11.43%	1	7	14.29%	11.90%
2023 / 05	000 NHS Organisation	6	35	17.14%	3	8	37.50%	20.93%
2023 / 06	000 NHS Organisation	3	22	13.64%	3	12	25.00%	17.65%
2023 / 07	000 NHS Organisation	0	9	0.00%	2	9	22.22%	11.11%
2023 / 08	000 NHS Organisation	0	5	0.00%	2	9	22.22%	14.29%
<b>Grand Total</b>		<b>53</b>	<b>445</b>	<b>11.91%</b>	<b>47</b>	<b>256</b>	<b>18.36%</b>	<b>14.27%</b>



## Exit Questionnaire Score Summary

### Description

This analysis is presented in both summary and detail views and calculates the sum of responses for all questions by individual Exit Questionnaire, where the highest possible score is 50. This is then averaged by the 'Group By' fields.

### View Selector (Detail)

Table Month View (Default)

Table

### Column Selector (Detail)

Organisation Level 1-13

Role

Staff Group

Leaving Reason

Destination on Leaving

Occupation Code

Pay Grade

Length of Service Band

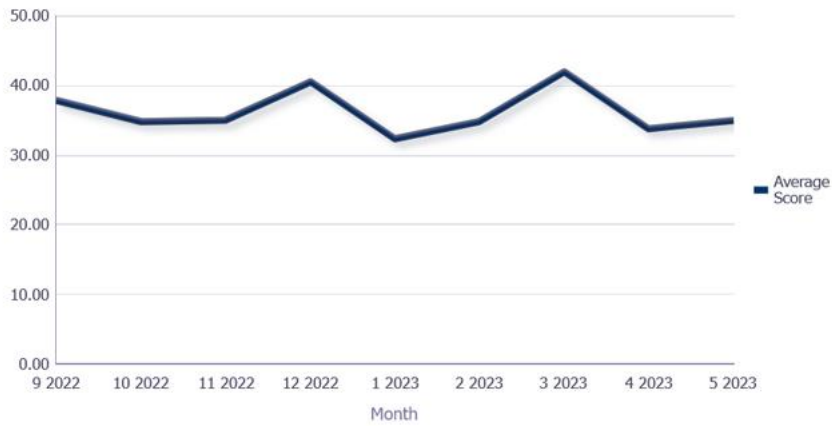
Various Protected Characteristics

### Data Items

<b>Detail:</b>	<b>Summary:</b>
Month	Month
Org Level 1-13	Average Score
Average Score	
Terminate Process Assignment Completions	
Leavers Completions	

### Example Screenshot

Strongly Agree = 5, Agree = 4, Neither Agree or Disagree = 3, Disagree = 2, Strongly Disagree = 1, No Response Received = 0/null



Group by: Org L1   
 View: Table (Month View)

Month	Org L1	Average Score	Terminate Process Asg. Completions	Leaver Completions
9 2022	000 NHS Organisation	37.83	8	4
10 2022	000 NHS Organisation	34.78	6	5
11 2022	000 NHS Organisation	35.13	7	9
12 2022	000 NHS Organisation	40.50	0	4
1 2023	000 NHS Organisation	32.33	3	5
2 2023	000 NHS Organisation	34.88	3	6
3 2023	000 NHS Organisation	42.00	1	2
4 2023	000 NHS Organisation	33.88	3	8
5 2023	000 NHS Organisation	35.00	1	2
		<b>35.75</b>	<b>32</b>	<b>45</b>

## Exit Questionnaire Analysis

### Description

This analysis is presented in both summary and detail views and calculates the average score by question where an employee has provided a response. The average is calculated by adding up the total score by question and dividing by the total number of completions (by question). Where an employee has not provided an answer, this is not attributed a value and will not contribute to the number of completions.

### View Selector (Summary)

Summary Graph (Default)  
Opportunities to Show Initiative  
Able to Make Suggestions  
Able to Make Improvements Happen  
Looking Forward to Going to Work  
Enthusiastic About Job  
Passage of Time  
Health and Wellbeing  
Career Progression  
Flexible Working  
Contribution Valued

### Column Selector (Detail)

Organisation Level 1-13  
Role  
Staff Group  
Leaving Reason  
Destination on Leaving  
Occupation Code  
Pay Grade  
Age Band  
Length of Service Band  
Various Protected Characteristics

### Data Items

Detail:	Summary:
Month	Month
Org Level 1-13	Average Score
Opportunities to Show Initiative	Exit Questionnaire Questions
Able to Make Suggestions	
Able to Make Improvements Happen	
Looking Forward to Going to Work	
Enthusiastic About Job	
Passage of Time	
Health and Wellbeing	
Career Progression	
Flexible Working	
Contribution Valued	

## Example Screenshot



## IAT Operations Tab

### Description

This page of the dashboard contains three analyses, two showing summary information relating to IAT and one showing detail information. (Note: all analyses on this page have been limited to Recruitment Source = NHS Organisation).

### Prompts

Hire Date

IAT Operation Status

## Summary

### Description

This analysis is designed to show summary information of where IAT has been used, has not been used and % figures. Grouping is available by Age Band, Staff Group, Job Role and Organisation Levels 1-7.

### View Selectors:

Pivot Table

Bar Graph (Default)

Pie Graph

### Action Links:

None

### Data Items

Age Band	Staff Group
Role	Org L1-7
IAT Used (Headcount)	IAT Used (Headcount %)
IAT not Used (Headcount)	IAT not Used (Headcount %)

### Example Screenshot



## Average Days to PDS Applied

### Description

This analysis is designed to show the average number of days that the PDS was applied post hire (if any). Grouping is available by Age Band, Staff Group, Job Role and Organisation Levels 1-7.

### View Selectors:

Table

Bar Graph (Default)

### Action Links:

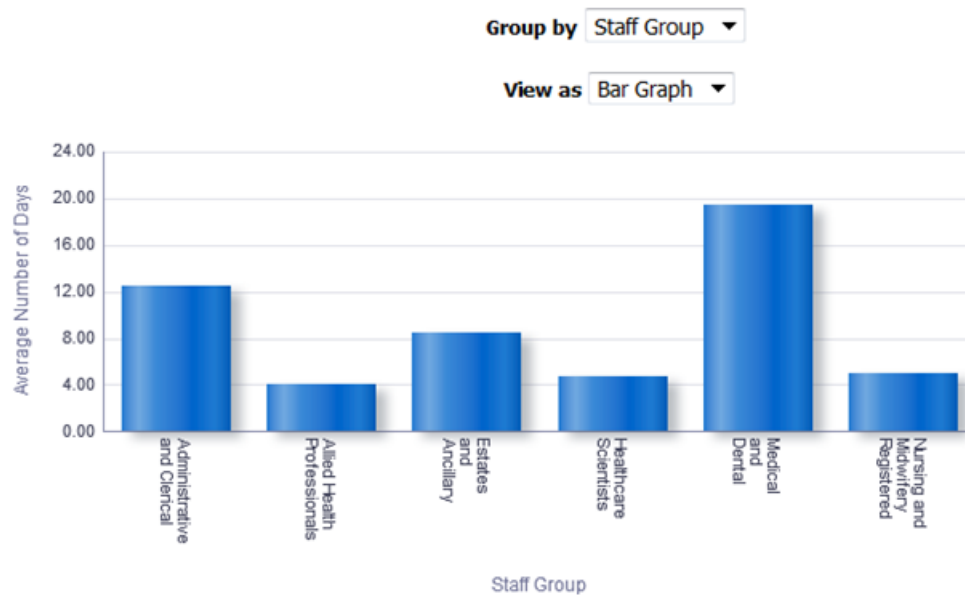
None

### Data Items

Age Band	Staff Group
Role	Org L1-7
Average Number of Days	

### Example Screenshot

Note: This analysis returns the average number of days that the PDS was applied post hire.



## Detail

### Description

This analysis is designed to show detail information relating to IAT.

### View Selectors:

None

### Action Links:

None

### Data Items

Employee Number	Employee Name
Organisation Name	Staff Group
Hire Date	Position Name
IAT Operations Date	IAT Operations Operation
IAT Operations User	IAT Operations Source VPD
IAT Operations Destination VPD	

### Example Screenshot

Detail

Employee Number	Employee Name	Organisation Name	Staff Group	Hire Date	Position Name	IAT Operations Date	IAT Operations Operation	IAT Operations User	IAT Operations Source VPD	IAT Operations Destination VPD
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Additional Clinical Services	22/02/2016	17771888[R&D Medical Facilitator G18 Research and Development			504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Additional Clinical Services	07/03/2016	17771888[R&D Medical Facilitator G18 Research and Development	18/03/2016	Approved	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	01/01/2016	17771888[R&D Medical Facilitator G18 Research and Development	07/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888[R&D Medical Facilitator G18 Research and Development	05/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888[R&D Medical Facilitator G18 Research and Development	07/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888[R&D Medical Facilitator G18 Research and Development	08/01/2016	Approved	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888[R&D Medical Facilitator G18 Research and Development	26/01/2016	PDS Applied	504MSMITH07		