NHS ELECTRONIC STAFF RECORD

ESR-NHS0274 - GUIDE TO ESRBI BANK AND AGENCY ADMINISTRATION DASHBOARD

Information Classification: PUBLIC

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Author:	Matt Madya
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Approvals:

Name	Chris Moorley
Title	Head of Development and Operations

DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
02/05/2018	Matt Madya	0.1	Initial Draft
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REVIEWERS

Name	Position
Charlotte Hampton	Assistant Development Advisor - BI
Chris Holroyd	Development Advisor - BI
James Haddon	Senior Development Advisor - BI, Reporting & Data Analysis
Sam Wright	Development Advisor - Workforce Information & Quality

DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
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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.

Bank and Agency Administration Dashboard

Description

This dashboard allows users to analyse Bank Work Requirements, Request Status, Reasons for Requests and Cancellations.

Definitions

Bank: *An internal pool of NHS staff that can be drawn upon as a resource should the need arise due to such as illness, holiday cover etc*

Bank Work Requirement: *A specific work requirement needing to be fulfilled by an individual from a 'Bank' or via an agency*

FTE: *Full Time Equivalence, the ratio of (weekly) hours required to fulfil the role to the employee contracted (weekly) hours.*

Allocation

This dashboard is available to the following URPs:

XXX Bank Administration

XXX BI Administration

XXX Finance Reporting

XXX Finance Reporting and Hub Mapping

XXX HR Administration

XXX HR Administration (With RA)

XXX HR Management

FTE Report

Description

This analysis enables users to view the amount of bank hours an organisation is requesting and booking within a date range. This analysis also enables users to view the amount of bank hours as a proportion of the total hours worked by the organisation. The FTE Report also allows users to compare bank utilisation between organisations.
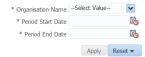
Prompts

* Organisation Name
* Period Start Date
* Period End Date

Data Items

Organisation	Bank Hours Requested % FILL
Standard Hours	Bank Hours Booked
Standard FTE	Bank Hours Booked FTE
Bank Hours Requested	Bank Hours Booked % FILL
Bank Hours Requested FTE	

* Organisation Name	--Select Value-- ▼
* Period Start Date	[ ] 📇
* Period End Date	[ ] 📇

Apply   Reset ▼

◢

Organisation	Standard Hours	Standard FTE	Bank Hours Requested	Bank Hours Requested FTE	Bank Hours Requested % FILL	Bank Hours Booked	Bank Hours Booked FTE	Bank Hours Booked % FILL
000 NHS ESR Organisation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	0.79	0.02	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	0.86	0.02	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	1.07	0.03	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	1.08	0.02	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	1.61	0.04	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	2.14	0.06	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	2.57	0.07	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	2.68	0.07	0.00	0.00	0.00	0.00	0.00	0.00
000 NHS ESR Organisation	2.86	0.07	0.00	0.00	0.00	0.00	0.00	0.00

Requirement Reasons

Description

This analysis enables users to view details of all bank work requirements that have been raised within a specified date range, along with the reason for each requirement being raised.

Prompts

* Organisation Hierarchy
* Requesting Organisation(s)
* Work Requirement Reason
Shift Date From
Shift Date To

Data Items

Organisation	Hours Required
Position To Be Covered	Work Requirement Reference
Grade Required	Work Req Requested By
Start Shift Date	Requirement Reason
Shift Type	

Example Screenshot

* Organisation Hierarchy --Select Value-- ▼   * Requesting Organisation(s) (All Column Values) ▼   * Work Requirement Reason (All Column Values) ▼

Shift Date From 01/04/2018   Shift Date To 27/04/2018 📇

Apply   Reset ▼

Organisation	Position To Be Covered	Grade Required	Start Shift Date	Shift Type	Hours Required	Work Requirement Reference	Work Req Requested By	Requirement Reason
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	31/10/2013	Late/Afternoon	06:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	11/02/2015	Late/Afternoon	06:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	13/02/2015	Late/Afternoon	07:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	13/02/2015	Late/Afternoon	11:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	21/02/2015	Late/Afternoon	07:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	24/02/2015	Late/Afternoon	06:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	27/02/2015	Late/Afternoon	06:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	30/04/2015	Late/Afternoon	06:00	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	11/05/2015	Late/Afternoon	06:30	00011	Blogs, Mr. Joe	Vacancy
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	14/05/2015	Late/Afternoon	08:30	00011	Blogs, Mr. Joe	Vacancy

Requirements Status

Description

This analysis enables users to view details of all bank work requirements and their current status. The Work Requirement Status prompt available enables users to restrict the analysis to one or more specific statuses.

Prompts

Work Requirement Status

Shift Date Between

Data Items

Organisation	Work Requirement Reference
Position To Be Covered	Work Requirement Status
Grade Required	Filled By
Start Shift Date	Filled By Role
Shift Type	Filled By Grade Payscale
Hours Required	Date Filled
Work Req Requested By	

Example Screenshot

Work Requirement Status --Select Value-- Shift Date Between 01/04/2018 - 27/04/2018

Apply   Reset ▾

Organisation	Position To Be Covered	Grade Required	Start Shift Date	Shift Type	Hours Required	Work Req Requested By	Work Requirement Reference	Work Requirement Status	Filled By Role	Filled By Grade Payscale
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	31/10/2013	Late/Afternoon	06:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	11/02/2015	Late/Afternoon	06:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	13/02/2015	Late/Afternoon	07:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	13/02/2015	Late/Afternoon	11:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	21/02/2015	Late/Afternoon	07:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	24/02/2015	Late/Afternoon	06:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	27/02/2015	Late/Afternoon	06:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	30/04/2015	Late/Afternoon	06:00	Blogs, Mr. Joe	00011	Unfilled		
000 NHS ESR Organisation	000000|Business Analyst|A2B|Information Technology	NHS|XR10|Review Body Band 10 - Range D	11/05/2015	Late/Afternoon	06:30	Blogs, Mr. Joe	00011	Unfilled		

Cancelled Requirements

Description

This analysis enables users to view details of all bank work requirements that have been raised and subsequently cancelled.

Prompts

*Shift Date Between

Requesting Organisation

Data Items

Organisation	Work Req Requested By
Position to be covered	Date Filled
Grade Required	Last Filled By

Start Shift Date	Cancellation Date
Shift Type	Cancellation Reason
Calc Hours Required	Cancelled By
Work Requirement Reference	

Bank Staff Posts

Description

This analysis enables users to view details of all employees currently holding a bank post, details of that bank post, and, any other bank posts the employee may also hold.

Please note that employees with no bank assignments are excluded from the Bank Staff Posts analysis.

Prompts

Bank Post Held
Assignment Organisation
Staff Group
Assignment Category
Show only Inactive Assignments Not Worked > X Months where X =

Data Items

Employee Number	Position Title
Employee Name	Position Number
Initials	Grade
Bank Posts Held	Contracted Hours
Organisation	Assignment Category
Organisation Levels 1-13	FTE
Staff Group	Last Date Booked
Role	Post Start Date

Example Screenshot

Bank Posts Held [Bank Only;Bank and ▼] Assignment Organisation [--Select Value-- ▼] Staff Group [--Select Value-- ▼] Assignment Category [--Select Value-- ▼]

Show only Inactive Assignments Not Worked > X Months where X = [   ]

[Next] [Apply] [Reset ▼]

Group by [Organisation ▼] **and** [▼] **and** [▼] **and** [▼] [OK]

Employee Number	Employee Name	Initials	Bank Posts Held	Organisation			Staff Group	Role	Position Title	Position Number
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Nursing and Midwifery Registered	Advanced Practitioner	Nurse Clinician Advanced Practice	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Administrative and Clerical	Adviser	Bank - Counter Fraud Specialist	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Additional Clinical Services	Assistant	Pharmacy Storekeeper (Bank)	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Additional Clinical Services	Assistant	Pharmacy Storekeeper (Bank)	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Additional Clinical Services	Assistant	Pharmacy Storekeeper (Bank)	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Estates and Ancillary	Assistant	Facilities Assistant	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Additional Clinical Services	Assistant/Associate Practitioner	Complementary Therapist (bank)	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Additional Clinical Services	Assistant/Associate Practitioner	Generic Therapies Assistant	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Administrative and Clerical	Clerical Worker	Bank - Clerical Worker	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Administrative and Clerical	Clerical Worker	Bank Health Records Assistant	10002000
12345678	Blogs, Mr. Joe	J	Bank Only	000 NHS ESR Organisation			Administrative and Clerical	Clerical Worker	Bank Health Records Assistant	10002000