

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0276 - GUIDE TO ESRBI TRAVEL AND SUBSISTENCE DASHBOARD

Information Classification: PUBLIC

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# DOCUMENT CONTROL

## CHANGE RECORD

Date	Author	Version	Change Reference
02/05/2018	Matt Madya	0.1	Initial Draft
15/10/2018	Matt Madya	1.0	Initial Release
19/11/2018	Matt Madya	2.0	Updated following new ESRBI developments
10/06/2019	Matt Madya	3.0	Updated to correct a formatting issue
04/02/2020	Matt Madya	4.0	Updated following new ESRBI developments
22/03/2021	Matt Madya	5.0	Annual Review
18/06/2020	Matt Madya	6.0	Updated following new ESRBI developments
01/04/2022	Matt Madya	7.0	Annual Review
27/10/2023	Matt Madya	8.0	Annual Review

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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.

## Travel And Subsistence Dashboard

### Description

The dashboard provides authorised reporting users with information to capture personal and claim details for employees, and detail claims made or paid within a particular payroll period.

### Allocation

This dashboard is available to the following URPs:

XXX BI Administration  
XXX Finance Reporting  
XXX Finance Reporting and Hub Mapping  
XXX HR Administration  
XXX HR Administration (With RA)  
XXX HR Management  
XXX Recruitment & Applicant Enrolment Administration  
XXX Recruitment & Applicant Enrolment Data Entry  
XXX Recruitment Data Entry  
XXX Payroll Administration  
XXX Payroll Audit  
XXX Payroll Super Administration

## Claimant Details

### Description

This analysis provides authorised reporting users with information in order to detail claims made or paid within a particular payroll period.

### Prompts

\* Organisation Hierarchy  
Payroll  
Paid in Period  
User Type  
Expense Element  
Employee Number  
Supervisor  
Claim Date Between

### Data Items

Employee Number	Vehicle Engine cc
Employee Name	Vehicle Registration
Org L1-L13	Vehicle Fuel Type
Cost Centre Org L1-L13	Vehicle Shared
Home Address	Expense Element
Driving Licence Number	Allowance Type
Valid Insurance Cover	Miles Claimed
Insurance Renewal Date	Days Paid

Assignment Number	Unit Rate
Assignment Location	Claim From
Supervisor	Claim To
Job	Paid in Period
User Type	Value
Vehicle Make and Model	

### Example Screenshot

\* Organisation Hierarchy --Select Value-- Payroll --Select Value-- Paid in Period --Select Value-- User Type --Select Value--  
Expense Element --Select Value-- Supervisor --Select Value-- Employee Number --Select Value-- Claim Date Between  -

Employee	Full Name	Home Address	Driving Licence Number	Valid Insurance Cover	Insurance Renewal Date	Assignment	Assignment Location	Supervisor	Job	User Type	Vehicle Make and Model	Vehicle Engine cc	Vehicle Registration	Vehicle Fuel Type	Vehicle Shared	Expense Element	Allowance Type	Miles Claimed	Days Paid
12345678	Blogs, Mr. Joe	0 Popular Drive, Warwick, CV0 1BJ				12345678	ESR Offices, Warwick	Blogs, Mrs. Joe	Administrative and Clerical	Clerical Worker			BLO65 JO				000 Travel Allowance		
12345678	Blogs, Mr. Joe	0 Popular Drive, Warwick, CV0 1BJ				12345678	ESR Offices, Warwick	Blogs, Mrs. Joe	Administrative and Clerical	Clerical Worker			BLO65 JO				000 Travel Allowance		
12345678	Blogs, Mr. Joe	0 Popular Drive, Warwick, CV0 1BJ				12345678	ESR Offices, Warwick	Blogs, Mrs. Joe	Administrative and Clerical	Clerical Worker			BLO65 JO				000 Travel Allowance		

## Cumulative Cost

### Description

This analysis enables authorised users to analyse travel claims in order to optimise the trust's employee Expense User Type categories and further reduce the cost of travel.

### Prompts

- \* Organisation Hierarchy
- Payroll
- Paid in Period
- Claim From Date >=
- Claim To Date <=
- Employee Number

### Data Items

Financial Code	Travel Paid £'s
Employee Number	Employers NI(Travel)
Assignment Number	Travel Paid Miles
Employee Name	Subsistence Paid £'s
Org L1-L13	Employers NI(Subsistence)
Cost Centre Org L1-L13	User Type
Organisation	Vehicle Registration
Payroll Period	

### Example Screenshot

\* Organisation Hierarchy  Payroll  Paid in Period

Claim From Date >=  Claim To Date <=  Employee Number

Financial Code	Assignment	Employee Name	Organisation	Payroll Period	Travel Paid £'s	Employers NI(Travel)	Travel Paid Miles	Subsistence Paid £'s	Employers NI(Subsistence)
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2014 Week	26.80	0.00	0	0.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2015 Week	206.63	11.63	0	0.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2016 Week	457.81	18.07	0	10.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2018 Week	135.45	0.00	301	0.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2018 Week	35.00	2.83	125	0.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2013 Week	418.73	5.72	0	205.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2014 Week	118.80	4.00	0	55.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2015 Week	59.19	2.88	0	5.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2016 Week	69.75	0.00	0	0.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	11 2014 Week	0.00		0	115.00	
NHS  N  000N000  NHS0000    0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	11 2015 Week	0.00		0	100.00	