NHS ELECTRONIC STAFF RECORD

ESR-NHS0388 - GUIDE TO ESRBI STAFF MOVEMENTS DASHBOARD – BANK ADJUSTED

Information Classification: PUBLIC

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DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
01/09/2025	Matt Madya	1.0	Initial Release

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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.

Staff Movements Dashboard – Bank Adjusted

Description

This dashboard is designed to provide users with intelligence on the movements of staff within the organisation, including Substantive to Bank movers as leavers.

Allocation

This dashboard is available to the following URPs:

XXX Administrator Self Service (Payroll Approvals Not Required)
XXX Administrator Self Service (Payroll Approvals Required)
XXX BI Administration
XXX Finance Reporting
XXX Finance Reporting and Hub Mapping
XXX HR Administration
XXX HR Administration (With RA)
XXX HR Management
XXX Manager Self Service (Payroll Approvals Not Required)
XXX Manager Self Service (Payroll Approvals Required)
XXX Payroll Administration
XXX Payroll Audit
XXX Payroll Super Administration
XXX Supervisor Self Service
XXX Supervisor Self Service (Limited Access)

Summary Tab

Description

Included in this tab are analyses similar to those already included in the NHS Staff Movements Dashboard > Summary page, but also includes Substantive to Bank movers as leavers. Therefore all the measures within the below analyses have been adjusted to include Substantive to Bank leavers.

Note: The FTE figures returned in this dashboard will not include Substantive to Bank leavers due to FTE being zero on the day of termination. We are currently working on further updates to this dashboard including FTE and monthly figures. Once implemented communications will be sent to users through the normal channels.

Please note that this dashboard may take slightly longer to complete than other dashboards due to the data being returned.

Prompts

Organisation
Staff Group(s)
Occupation Code(s)
Employee Category
Person Type(s)

Employee Person Types

Assignment Category (Default exclude Locum, Bank, Honorary)

Date From (Default First day of month, 3 months ago)

Date To (Default last day of last month)

Organisation Level 1-13

 Job Role

Pay Grade(s)

Assignment Status

Recruitment Source

Leaving Reason

Primary Assignments Only

Labour Turnover Rate

Data Items

Title	Description
Starters Headcount	
Starters FTE	
Average Headcount	(Headcount at first day of period + Headcount at last day of period) / 2
Leavers Headcount	
LTR Headcount %	(Leavers Headcount / Average Headcount) * 100
Average FTE	(FTE at first day of period + FTE at last day of period) / 2
Leavers FTE	
LTR FTE %	(Leavers FTE / Average FTE) * 100

Example Screenshot

Labour Turnover Rate

Starters Headcount	70
Starters FTE	60.60
Avg Headcount	1,940.00
Leavers Headcount	47
LTR Headcount %	2.42
Avg FTE	1,722.40
Leavers FTE	36.84
LTR FTE %	2.14

Refresh - Print - Export - Add to Briefing Book
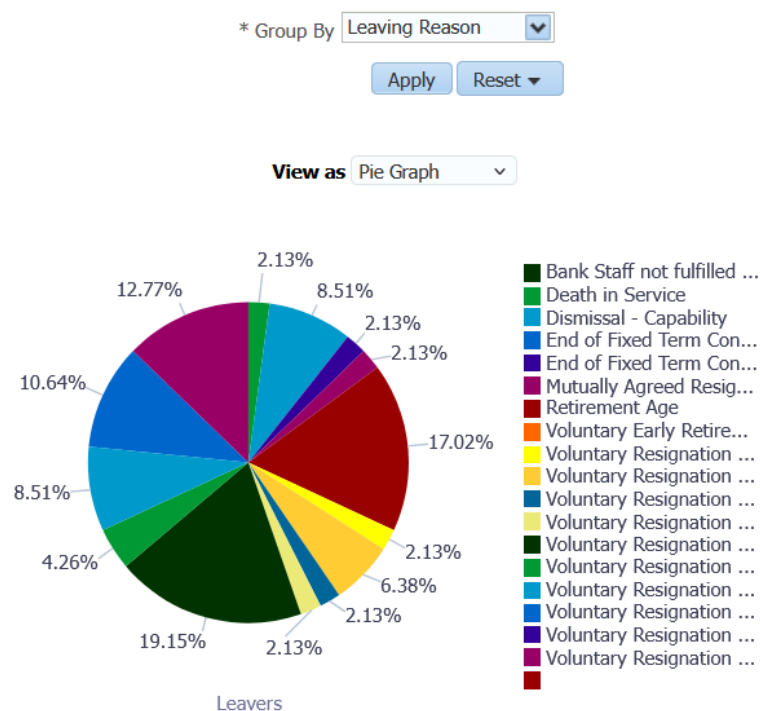
Leavers Summary

Data Items

Title	Description
Destination on Leaving	
Reason for Leaving	
Headcount	Number of employees with termination date between date Prompts
Length of Service	
Occupation Code	
Role	
Pay Grade	
Org Levels 1-13	
Cost Centre Org Level 1-12	
Cost Centre	

View Selectors

View as Pie, Table or Column Graph (default Pie Graph).
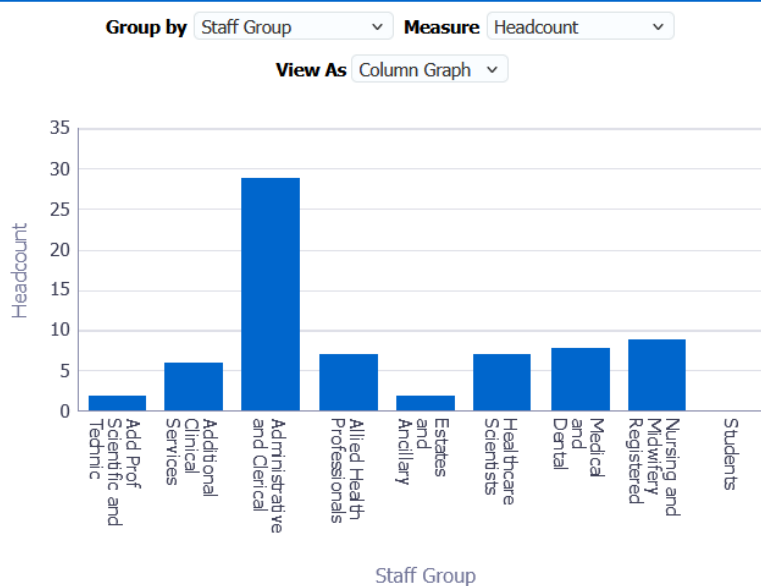
Example Screenshot

Leavers Summary

Hires Summary

Data Items

Title	Description
Staff Group	Staff Group associated with Job Role in position
Recruitment Source	
Headcount	Number of employees with first hire date between date Prompts
Assignment Count	Count of Assignments where hire date is between date prompts
Occupation Code	
Pay Grade	
Role	
Org Levels 1-13	
Cost Centre Org Level 1-12	
Cost Centre	

View Selectors

View as Pie Chart, Table or Column Chart (Default Column Chart)

Example Screenshot

Detail Tab

Description

The analysis in this tab is similar to the Leavers Detail analysis already included in the NHS Staff Movements Dashboard, but with the filters adjusted to also include Substantive to Bank movers as leavers.

Prompts

Organisation
Staff Group(s)
Occupation Code(s)

Employee Category

Person Type(s)

Employee Person Types

Date From (Default First day of month, 3 months ago)

Date To (Default last day of last month)

Organisation Level 1-13

 Job Role

Pay Grade(s)

Assignment Status

Recruitment Source

Leaving Reason

Primary Assignments Only

Data Items

Employee Number	Contract Hours
Last Name	Pay Grade
Middle Name	Disability (not available in HRSS)
First Name	Nationality (not available in HRSS)
Title	NI Number (not available in HRSS)
Employee Person Type	Address Line 1
Assignment Number	Address Line 2
FTE	Address Line 3
Organisation	Town or City
Length of Service (Months)	County
Length of Service (Years)	Postal Code
Destination on Leaving	Religious Belief (not available in HRSS)
Termination Date	Marital Status (not available in HRSS)
Leaving Reason	Sexual Orientation (not available in HRSS)
Staff Group	Gender (not available in HRSS)
Frequency	Role
Assignment Category	Area of Work
Assignment Status	Occupation Code
Subjective Code	Notified Date
Salary Value	TUPE Transfer
AfC Spinal Point	Spinal Value
Assignment Initial Start Date	NHS Entry Date
Org Level 1-13	Property Register (Y/N Flag)
Cost Centre Org Level 1-12	Exit Questionnaire
Ethnic Origin (not available in HRSS)	Key Worker Programme
Age Band (not available in HRSS)	Primary Pay scale Letter
Date of Birth (not available in HRSS)	Cost Centre
Email Address	Person Effective Start Date
Residency Status	PAYE Aggregated Assignments

NI Multiple Assignments	Primary Assignment
NHS Organisation	Home Phone
Mobile Phone	Personal Email Address
Supervisor Email Address	Supervisor Name

Example Screenshot

Assignment Category	Assignment Status	Primary Assignment	Subjective Code	Full Time Salary	Actual Salary	NHS Entry Date	TUPE Transfer	Property Register Items	Key Worker Programme	Exit Questionnaire
Permanent	Active Assignment	Y	82056390100	£31,049.00	£31,049.00	13/12/2021			0 No	Yes
Fixed Term Temp	Active Assignment	Y	82054540100	£27,485.00	£21,988.00	30/08/2022			0 No	
Permanent	Active Assignment	Y	82052690100	£37,796.00	£34,772.32	30/04/2012			0 No	
Permanent	Active Assignment	Y	82052720100	£24,465.00	£24,465.00	07/04/2025			0 No	
Fixed Term Temp	Active Assignment	Y	82052920100	£19,553.55	£19,553.55	07/04/2025			0 No	Yes
Fixed Term Temp	Active Assignment	Y	82052360100	£54,710.00	£21,884.00	25/12/1973			0 No	
Permanent	Active Assignment	Y	82056570100	£26,598.00	£10,639.20				0 No	
Permanent	Active Assignment	Y	82052690100	£33,487.00	£26,789.60	30/10/2020			0 No	Yes
Permanent	Active Assignment	Y	82052680100	£38,682.00	£29,398.32	11/05/2020			0 No	
Permanent	Active Assignment	Y	82056580100	£24,465.00	£12,395.68	02/12/2002			0 No	
Permanent	Active Assignment	Y	82052360100	£50,273.00	£50,273.00	21/02/2005			0 No	
Permanent	Active Assignment	Y	82052700100	£27,485.00	£21,988.00	11/09/2023			0 No	
Fixed Term Temp	Active Assignment	Y	82052720100	£23,874.88	£23,874.88	07/04/2025			0 No	