A Guide to Alerts

Introduction

An Alert is a combination of a short analysis (limited to 75 rows) and an Agent which delivers the results of the analysis. They are designed to highlight information or alert the recipient to where they may need to take action based on the contents of the alert.

If an Alert exceeds 75 rows, the content will be delivered up to and including the 75th row.

Subscribing to an Alert

The Agent which delivers the alert analysis can be found in an Alerts folder within the respective Dashboard items folder within the Catalog. From here, users are able to subscribe to the Agent by selecting the object and navigating to 'more' then 'subscribe'. The user will then receive the alert as per the schedule outlined below.

Local Copies and Selecting Recipients

Organisations may want to select individual recipients or URPs to receive the alert without the need for each person to subscribe to the Agent. To do this, users will need to take a copy of the Agent and set the recipients. The recipients can be defined by username or by application role (URP). Guidance on copying BI objects can be found in ESRBI - Creating a Local Version of a National Dashboard, which is available on the ESR Hub.

Local BI Administrators are able to create agents for both national and local analyses. A guide to creating alerts can be found on the ESR Hub titled ESRBI - Alerting.

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NHS Absence Dashboard

Annual Leave Entitlement Status Summary

Alerts subscribers to the number of assignments that have exceeded their annual leave entitlement balance, grouped by their Organisation. The alert has a narrative providing a count of the number of Organisations affected and will continue count the number of assignments and organisations each time the report is run as long as they meet the criteria.

There are currently 3 Organisations that have assignments who have exceeded their annual leave entitlement balance.
There are currently 258 assignments who have exceeded their annual leave balance.

Please be aware that alerts are limited to 75 rows. This alert has 3 rows. More information on annual leave balances can be found on the NHS Absence Dashboard.

Organisation Name	Number of Assignments Exceeded Balance
000 NHS Organisation	258

Object Location	Shared Folders > NHS Standard Dashboards > NHS Absence Dashboard Items > Alerts > NHS Annual Leave Entitlement Status Summary Alert
Schedule	• Monthly • First day of the month • 7.30am
Condition	• Alert will be delivered if NHS Annual Leave Entitlement Status Summary Analysis returns one or more rows
Delivery Content	• NHS Annual Leave Entitlement Status Summary Analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration XXX HR Administration (With RA) XXX HR Management
Destination	• Homepage and Dashboard • Devices
Actions	• None

Annual Leave Entitlement Status

Identifies to subscribers which assignments have exceeded their annual leave entitlement balance. Assignments are sorted in descending order of percentage of leave overtaken. Assignments will continue to be returned every time the report is run as long as they meet the criteria.

Alerts are limited to 75 rows. This alert has 32 rows.

More information on entitlement balances can be found on the NHS Absence Dashboard.

Organisation Name	Employee Name	Assignment Number	Supervisor Name	Supervisor Email Address	Accrual Start Date	Previous Year Carryover	Entitlement	Leave Taken	Leave Booked	Total Leave	Leave Remaining	Percentage Overtaken
000 NHS Organisation	Bloggs, Miss Joanne	12345678-9	Bloggs, Mr. Joe	joebloggs1234@nhs.net	01-Apr-2021	0.00	100.00	200.00	0.00	200.00	-100.00	200.00%

Object Location	Shared Folders > NHS Standard Dashboards > NHS Absence Dashboard Items > Alerts > NHS Annual Leave Entitlement Status Alert
Schedule	- Monthly - First day of the month 7.30am
Condition	Alert will be delivered if NHS Annual Leave Entitlement Status Analysis returns one or more rows
Delivery Content	- NHS Annual Leave Entitlement Status Analysis - Excel Attachment
Recipients	Available for subscription to: XXX Administrator Self Service (Payroll Approvals Not Required) XXX Administrator Self Service (Payroll Approvals Required) XXX BI Administration XXX Manager Self Service (Payroll Approvals Not Required) XXX Manager Self Service (Payroll Approvals Required) XXX Supervisor Self Service XXX Supervisor Self Service (Limited Access)
Destination	- Homepage and Dashboard - Devices
Actions	None

Percentage Annual Leave Taken

The Alert highlights to subscribers where employees have not taken or booked at least 75% of their annual leave entitlement, three months or less prior to their accrual end date. Assignments will continue to be returned monthly until the combined total of leave taken and booked is more than 75% of their overall entitlement.

Assignment Number	Entitlement	Previous Year Carryover	Leave Taken/Booked	% Leave Taken/Booked	Accrual Start Date	Accrual End Date
12345678-2	217.5	0.0	108.75	50.0	01/04/2022	31/03/2023

Object Location	Shared Folders > NHS Standard Dashboards > NHS Absence Dashboard Items > Alerts > NHS % Annual Leave Taken Alert
Schedule	• Monthly • First day of the month • 7.30am
Condition	• Alert will be delivered if NHS % Annual Leave Taken Alert Analysis returns one or more rows
Delivery Content	• NHS % Annual Leave Taken Alert Analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration XXX HR Administration (With RA) XXX HR Management
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Assignment Changes Dashboard

Supervisor Changes

The Alert identifies supervisors that had a change made to their assignment and the number of employee assignments where the direct report did not have a change made to the supervisor on the same day. The Alert operates on change events that happened the day prior to delivery.

List of changes included:

- Update Supervisor
- Update Supervisor Assignment
- Update Position
- Update Organisation
- Update Assignment Location
- Update Assignment Job
- Update Assignment Status
- Update Assignment Manager Flag
- Update Assignment Supervisor Worker Number
- Add Actual Termination Date
- Change Actual Termination Date
- Delete Actual Termination Date

The below listed supervisors had a change made to their assignment yesterday. The number of employee assignments returned relate to assignments that did not have changes made to their

Please review the change(s) made to the supervisor assignment.

To see the assignments that report into the below supervisor assignment numbers, please see the Supervisor Hierarchy (NHS Staff in Post Dashboard).

Supervisor Name	Supervisor Employee Number	Supervisor Assignment Number	Employee Assignments
Bloggs, Ms Joanne	01234567	01234567-4	12

Object Location	Shared Folders > NHS Standard Dashboards > NHS Assignment Changes Dashboard Items > Alerts > NHS Supervisor Changes Alert
Schedule	• Daily • 7.05am
Condition	• Alert will be delivered if NHS Supervisor Changes Alert Analysis returns one or more rows
Delivery Content	• NHS Supervisor Changes Alert Analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration

	XXX HR Administration (With RA)
	XXX HR Management
	XXX Payroll Administration
	XXX Payroll Audit
	XXX Payroll Super Administration
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Data Quality Dashboard

Employee Termination Data Quality

Alerts subscribers of employees that have an Actual Termination Date and do not have Destination on Leaving or the NHS Organisation (where the Destination on Leaving is NHS Organisation). The alert will return employees one, two, and four weeks before their Actual Termination Date. Employees will continue to be returned until the missing information is populated in ESR or the Termination Date has passed.

Organization Name	Employee Name	Employee Number	Assignment Number	Employee Email Address	Supervisor Name	Supervisor Email Address	Destination On Leaving	NHS Org Leaving For	Actual Termination Date
000 Organisation	Bloggs, Miss Joanne	12345678	12345678-2	joebloggs1234@nhs.net	Smith, Miss Jane	janesmith12345@nhs.net			31/12/2022

Object Location	Shared Folders > NHS Standard Dashboards > NHS Data Quality Dashboard Items > Alerts > NHS Employee Termination Data Quality Alert
Schedule	• Daily • 7.50am
Condition	• Alert will be delivered if NHS Employee Termination Data Quality Alert Analysis returns one or more rows
Delivery Content	• NHS Employee Termination Data Quality Alert Analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration XXX HR Administration (With RA) XXX HR Management
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Learning Dashboard

Classes with Available Spaces

Alerts subscribers to where classes have waiting list disabled, an enrolment end date populated and have spaces available. Classes within the next 90 days (from the next day) are returned.

Course	Delivery Mode	Title	Start Date	Places Remaining	Start Time	End Time	Enrolment Start Date	Enrolment End Date	Primary Venue	Class Status	Maximum Attendees	Minimum Attendees	Internal Delegates	Customers	All Delegates Count
000 Course	Classroom	000 Course Title	01/01/2021	15	09:30	12:00	01/01/2020	31/12/2020		Normal	20		0	0	0
000 Course	Classroom	000 Course Title	01/01/2021	15	09:30	13:00	01/01/2020	31/12/2020		Normal	20		0	0	0
000 Course	Classroom	000 Course Title	01/01/2021	15	13:00	16:00	01/01/2020	31/12/2020		Normal	20		1	0	1
000 Course	Classroom	000 Course Title	01/01/2021	15	13:30	16:00	01/01/2020	31/12/2020		Normal	20		0	0	0

Object Location	Shared Folders > NHS Standard Dashboards > NHS Learning Dashboard Items > Alerts > NHS Classes with Available Spaces Alert
Schedule	- Weekly - Monday 9.30am
Condition	Alert will be delivered if NHS Classes with Available Spaces Analysis returns one or more rows
Delivery Content	- NHS Classes with Available Spaces Analysis - Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX Learning Administration XXX Class Administration Not available to Learning Instructor URP.
Destination	- Homepage and Dashboard - Devices
Actions	None

New and Updated Positions

The Alert identifies newly created positions, and positions that have been updated and there has been a change to the position's Hiring Status since the last position effective start date. The position must have been created or updated the previous day in order to be returned.

This alert identifies positions created yesterday, and positions updated yesterday where there has been a change in the hiring status since the previous position effective start date.

Organisation Name	Position	Position Title	Occupation Code	Staff Group	Role	Grade	Frontline Healthcare Worker	Hiring Status	Effective Start Date	Effective End Date	Created Date	Last Updated Date
000 Acute Nursing 1	87654321	Nursing Manager	N1A	Nursing and Midwifery Registered	Manager	NHS|XR07|Review Body Band 7	Yes	Active	01/12/2023	31/12/4712	01/12/2023	01/12/2023
000 Finance Department	12345678	Finance Administrator	G2D	Administrative and Clerical	Clerical Worker	NHS|XN04|Non Review Body Band 4	No	Eliminated	01/12/2023	31/12/4712	01/01/2023	01/12/2023

Object Location	Shared Folders > NHS Standard Dashboards > NHS Learning Dashboard Items > Alerts > NHS New and Updated Positions Alert
Schedule	- Daily 12.00pm
Condition	Alert will be delivered if the NHS New and Updated Positions Alert Analysis returns one or more rows
Delivery Content	- NHS New and Updated Positions Alert Analysis - Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX Learning Administration Not available to Learning Instructor and Class Administration URPs.
Destination	- Homepage and Dashboard - Devices
Actions	None

NHS Payroll Dashboard

Assignments without Payment Methods

Alerts to subscribers where an assignment does not have a payment method recorded. This excludes employees where the assignment type is bank or honorary. Applicants are also excluded.

Organization Name	Employee Number	Assignment Number	Employee Name	Employee Email Address
000 NHS Organisation	01234567	01234567-3	Bloggs, Mr. Joseph	j.bloggs1@nhs.net

Object Location	Shared Folders > NHS Standard Dashboards > NHS Payroll Dashboard Items > Alerts > NHS Assignments without Payment Method Alert
Schedule	• Weekly • Monday • 8am
Condition	• Alert will be delivered if Assignments without Payment Method analysis returns one or more rows
Delivery Content	• Assignments without Payment Method analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX Finance Administration XXX Payroll Administration XXX Payroll Audit XXX Payroll Super Administration
Destination	• Homepage and Dashboard • Devices
Actions	• None

Outstanding Elements (Overpayments)

Alerts to subscribers employees who have had a termination date entered yesterday, and have one or more elements against their assignment which may lead to an overpayment. A full list of elements can be found by opening the Alert analysis within the Catalog.

This Alert identifies employees who had a termination entered yesterday and have elements against their assignments which may lead to an overpayment.

Actual Termination Date	Organisation Name	Employee Name	Employee Number	Assignment Number	Element Name	Entry Value
01/12/2023	000 Finance Department	Smith, Mrs Joanne	12345678	12345678	Salary Sacrifice Grp 0 NR NHS	000 Computer Scheme
31/03/2024	000 Outpatients 1	Jones, Mr. Bob	87654321	87654321-3	AfC Short Recruit Retain NHS	Recruit & Retain (S)

Object Location	Shared Folders > NHS Standard Dashboards > NHS Payroll Dashboard Items > Alerts > NHS Outstanding Elements (Overpayments) Alert
Schedule	- Daily 8.10am
Condition	Alert will be delivered if the NHS Outstanding Elements (Overpayments) Alert Analysis returns one or more rows
Delivery Content	- NHS Outstanding Elements (Overpayments) Alert Analysis - Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX Finance Administration XXX Payroll Administration XXX Payroll Audit XXX Payroll Super Administration
Destination	- Homepage and Dashboard - Devices
Actions	None

NHS Position Analysis Dashboard

New and Updated Positions

The Alert identifies newly created positions, and positions that have been updated and there has been a change to the position's Hiring Status since the last position effective start date. The position must have been created or updated the previous day in order to be returned.

This alert identifies positions created yesterday, and positions updated yesterday where there has been a change in the hiring status since the previous position effective start date.

Organisation Name	Position	Position Title	Occupation Code	Staff Group	Role	Grade	Frontline Healthcare Worker	Hiring Status	Effective Start Date	Effective End Date	Created Date	Last Updated Date
000 Acute Nursing 1	87654321	Nursing Manager	N1A	Nursing and Midwifery Registered	Manager	NHS|XR07|Review Body Band 7	Yes	Active	01/12/2023	31/12/4712	01/12/2023	01/12/2023
000 Finance Department	12345678	Finance Administrator	G2D	Administrative and Clerical	Clerical Worker	NHS|XN04|Non Review Body Band 4	No	Eliminated	01/12/2023	31/12/4712	01/01/2023	01/12/2023

Object Location	Shared Folders > NHS Standard Dashboards > NHS Position Analysis Dashboard Items > Alerts > NHS New and Updated Positions Alert
Schedule	• Daily • 12.00pm
Condition	• Alert will be delivered if the NHS New and Updated Positions Alert Analysis returns one or more rows
Delivery Content	• NHS New and Updated Positions Alert Analysis • Excel Attachment
Recipients	Available for subscription to: XXX BI Administration XXX Finance Reporting XXX Finance Reporting and Hub Mapping XXX HR Administration XXX HR Administration (With RA) XXX HR Management XXX Local Workstructures Administration
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Recruitment Dashboard

Missing Information

Alerts to subscribers the number of employees or assignments that have missing information and have a latest start date within the next two weeks.

Employees with a latest start date between 04/01/2021 and 20/01/2021 have the following missing information:

There are 2 employees missing CSD 1 Week.
There are 56 employees missing CSD 3 Months.
There are 14 employees missing CSD 12 Months.
There are 5 employees missing NI Number.
There are 133 employees missing Aggregate Service Days.
There are 133 employees missing Aggregate Service Years.
There are 6 employees missing Date of Birth Verified.
There are 2 employees missing Employee Email Address.
There are 46 employees missing NHS OMP Scheme.
There are 22 employees missing NHS OSP Scheme.
There are 2 employees missing Address Line 1.
There are 9 employees missing Recruitment Source.
There are 9 employees missing the NHS Organisation Recruitment Source.

There are 1 assignments missing Assignment Category.
There are 0 assignments missing Contract Hours.
There are 0 assignments missing Frequency.
There are 1 assignments missing Fixed Term Contract End Date.
There are 36 assignments missing Spinal Point
There are 1 assignments missing Pay Scale.
There are 34 assignments missing Payroll Name.
There are 0 assignments missing Paypoint.
There are 0 assignments missing Position Name.
There are 68 assignments missing Supervisor Name.
There are 0 assignments missing Location Name.

There are 41 employees missing Nationality.
There are 9 employees missing Religious Belief.
There are 9 employees missing Sexual Orientation
There are 3 employees missing Ethnic Origin.
There are 3 employees missing Disability Category.

Note: An analysis inclusive of all missing employee and assignment information can be found on the NHS Recruitment Dashboard.

Object Location	Shared Folders > NHS Standard Dashboards > NHS Recruitment Dashboard Items > Alerts > NHS New Starter Missing Information Alert
Schedule	• Weekly • Monday • 7.20 am
Condition	• There is no condition. The Alert will always be delivered.
Delivery Content	• NHS Missing Information Alert analysis • PDF Attachment
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration

	XXX HR Administration (With RA)
	XXX HR Management
	XXX Recruitment & Applicant Enrolment Administration
	XXX Recruitment & Applicant Enrolment Administration (With RA)
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Staff Movements Dashboard

Projected New Starter

Alerts to subscribers the applicants who have a projected hire date as of the date the alert runs, and those that have a projected hire date 14 days from the current date. Only applicants with a status of 'offer accepted' are returned. The alert identifies where recipients can find more information (NHS Recruitment Dashboard) and will state if the alert has exceeded 75 rows.

Note: Alerts are limited to 75 rows. Please be aware that this is not necessarily a count of a number of projected new starters and further detail can be found on the NHS Recruitment Dashboard.

Organisation	Position Name	▲ ▼	Employee Location Name	Role	Grade Name	Applicant Number	Employee Number	Applicant Name	Projected Hire Date	Supervisor Name	Supervisor Email Address
000 NHS Organisation	01234567|Senior Admin|123|Administration		000 Trust HQ	Admin	NHS|XR05|Non Review Body Band 5	012345	01234567	Bloggs, Mr. Joe	01/01/2022	Smith, Miss Jane	janesmith12345@nhs.net

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS Projected New Starter Alert
Schedule	- Daily 7.40am
Condition	Alert will be delivered if NHS Projected New Starter Alert Analysis returns one or more rows
Delivery Content	- NHS Projected New Starter Alert Analysis - Content delivered directly
Recipients	Available for subscription to: XXX BI Administration XXX HR Administration XXX HR Administration (With RA) XXX HR Management Not available for any other URPs which have access to the Dashboard folder.
Destination	- Homepage and Dashboard - Devices
Actions	None

New Starter

Alerts to subscribers the employees who have a latest start date as of the date the alert runs, and those that have a latest start date 14 days from the current date. The alert identifies where recipients can find more information (NHS Staff Movements Dashboard) and will state if the alert has exceeded 75 rows.

Note: Alerts are limited to 75 rows. Please be aware that this is not necessarily a count of a number of new starters and further detail can be found on the NHS Staff Movements Dashboard.

Organisation	Position Name	Employee Location Name	Role	Grade Name	Employee Number	Employee Name	Employee Latest Start Date	Supervisor Name	Supervisor Email Address
000 NHS Organisation	01234567|Senior Admin|123|Administration	000 Trust HQ	Admin	NHS|XR05|Non Review Body Band 5	01234567	Bloggs, Mr. Joe	01/01/2022	Smith, Miss Jane	janesmith12345@nhs.net

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS New Starter Alert
Schedule	• Daily • 7.40am
Condition	• Alert will be delivered if NHS New Starter Alert Analysis returns one or more rows
Delivery Content	• NHS New Starter Alert Analysis • Content delivered directly
Recipients	Available for subscription to: 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)
Destination	• Homepage and Dashboard • Devices
Actions	• None

Termination

Alerts to subscribers the employees who have a projected or actual termination date as of the date the alert runs, and those that have a projected or actual termination date 14 days from the current date. The alert identifies where recipients can find more information (NHS Staff Movements Dashboard) and will state if the alert has exceeded 75 rows.

Note: Alerts are limited to 75 rows.Please be aware that this is not necessarily a count of a number of leavers and further detail can be found on the NHS Staff Movements Dashboard.

Organisation	Position	Location	Grade	Role	Employee Number	Employee Name	Actual Termination Date	Projected Termination Date	Employee Email Address	Supervisor Name	Supervisor Email Address
000 NHS Organisation	01234567|Senior Admin|123|Administration	000 Trust HQ	NHS|XR05|Non Review Body Band 5	Admin	01234567	Bloggs, Mr. Joe	31/01/2022	31/01/2022	joebloggs1234@nhs.net	Smith, Miss Jane	janesmith12345@nhs.net

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS Termination Alert
Schedule	• Daily • 7.45am
Condition	• Alert will be delivered if NHS Termination Alert Analysis returns one or more rows
Delivery Content	• NHS Termination Alert Analysis • Content delivered directly
Recipients	Available for subscription to: 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)
Destination	• Homepage and Dashboard • Devices
Actions	• None

Probation Period End Date (Current Week)

Alerts to subscribers assignments that have an upcoming probation period end date in the forthcoming week (between the current date and 6 days from the current date). The Alert will notify users if it has exceeded 75 rows and advises where to find further information.

NHS Probation Period End Date (Current Week)

This Alert identifies all assignments with upcoming probation period end dates between **22/04/2024** and **28/04/2024**.

Organization Name	Employee Number	Assignment Number	Employee Name	Employee Latest Start Date	Supervisor Name	Supervisor Email Address	Probation Period	Probation Period End Date
000 Organisation Name	012345678	012345678-2	Bloggs, Miss Joanne	22/10/2023	Jones, Mr. Bob	bobjones123@nhs.net	6 Months	22/04/2024
000 Organisation Name	012345678	012345678-2	Bloggs, Miss Joanne	23/10/2023	Jones, Mr. Bob	bobjones123@nhs.net	6 Months	23/04/2024
000 Organisation Name	012345678	012345678-2	Bloggs, Miss Joanne	24/10/2023	Jones, Mr. Bob	bobjones123@nhs.net	6 Months	24/04/2024

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS Probation Period End Date (Current Week)
Schedule	• Weekly • Monday • 08.05am
Condition	• Alert will be delivered if NHS Probation Period End Date (Current Week) returns one or more rows
Delivery Content	• NHS Probation Period End Date (Current Week) Analysis • Excel Attachment
Recipients	Available for subscription to: 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)
Destination	- Homepage and Dashboard - Devices
Actions	None

Probation Period End Date (1 Month)

Alerts to subscribers assignments that have an upcoming probation period end date one month from the current date (i.e. if the current date is 22nd April, assignments with a probation period end date of 22nd May will be returned). The Alert will notify users if it has exceeded 75 rows and advises where to find further information.

NHS Probation Period End Date (1 Month)

Organization Name	Employee Number	Assignment Number	Employee Name	Employee Latest Start Date	Supervisor Name	Supervisor Email Address	Probation Period	Probation Period End Date
000 Organisation Name	012345678	012345678-2	Bloggs, Miss Joanne	22/11/2023	Jones, Mr. Bob	bobjones123@nhs.net	6 Months	22/05/2024

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS Probation Period End Date (1 Month)
Schedule	• Daily • 8.05am
Condition	• Alert will be delivered if NHS Probation Period End Date (1 Month) returns one or more rows
Delivery Content	• NHS Probation Period End Date (1 Month) Analysis • Excel Attachment
Recipients	Available for subscription to: 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)
Destination	• Homepage and Dashboard • Devices
Actions	• None

Probation Period End Date (3 Month)

Alerts to subscribers assignments that have an upcoming probation period end date one month from the current date (i.e. if the current date is 22nd April, assignments with a probation period end date of 22nd July will be returned). The Alert will notify users if it has exceeded 75 rows and advises where to find further information.

NHS Probation Period End Date (3 Month)

Organization Name	Employee Number	Assignment Number	Employee Name	Employee Latest Start Date	Supervisor Name	Supervisor Email Address	Probation Period	Probation Period End Date
000 Organisation Name	012345678	012345678-2	Bloggs, Miss Joanne	22/01/2024	Jones, Mr. Bob	bobjones123@nhs.net	6 Months	22/07/2024

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Movements Dashboard Items > Alerts > NHS Probation Period End Date (3 Month)
Schedule	• Daily • 8.05am
Condition	• Alert will be delivered if NHS Probation Period End Date (3 Month) returns one or more rows
Delivery Content	• NHS Probation Period End Date (3 Month) Analysis • Excel Attachment
Recipients	Available for subscription to: 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)
Destination	• Homepage and Dashboard • Devices
Actions	• None

NHS Staff Requirements Dashboard

Objectives Approaching Target Date

Alerts to subscribers the number of objectives an employee has approaching the target date in the next month. Objectives that have been achieved are not counted.

Organization Name	Employee Number	Employee Name	Supervisor Name	Number of Objectives
000 NHS Organisation	01234567	Bloggs, Ms. Joanne	Smith, Miss Jo	5

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Requirements Dashboard Items > Alerts > NHS Objectives Approaching Target Date Alert
Schedule	- Monthly - First day of the month 7am
Condition	Alert will be delivered if NHS Objectives Approaching Target Date Analysis returns one or more rows
Delivery Content	- Objectives Approaching Target Date Analysis - Excel Attachment
Recipients	Available for subscription to: XXX Administrator Self Service (Payroll Approvals Not Required) XXX Administrator Self Service (Payroll Approvals Required) XXX BI Administration XXX Manager Self Service (Payroll Approvals Not Required) XXX Manager Self Service (Payroll Approvals Required) XXX Supervisor Self Service XXX Supervisor Self Service (Limited Access) Not available for HR Manager and HR Administration URPs.
Destination	- Homepage and Dashboard - Devices
Actions	None

Band 8c and Above

Alerts to subscribers that the re-earnable portion of salary is upcoming to ensure requirements have been met where employees are on Band 8C or above and are at the top of the band. This will alert where employees have an increment in the same month.

Assignment Number	Employee Name	Pay Step Date▲ ▽	Pay Scale	Role	Organisation Name
01234567	Bloggs, Mr. Joe	14/05/2021	XR11	Administrator	000 NHS Organisation

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Requirements Dashboard Items > Alerts > NHS Band 8C and Above Alert
Schedule	• Monthly • First day of the month • 7.10am
Condition	• The Alert will be delivered if NHS Band 8C and Above returns one or more rows
Delivery Content	• Band 8c and Above analysis • Excel Attachment
Recipients	Available for subscription to: XXX Administrator Self Service (Payroll Approvals Not Required) XXX Administrator Self Service (Payroll Approvals Required) XXX BI Administration 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 Supervisor Self Service XXX Supervisor Self Service (Limited Access)
Destination	• Homepage and Dashboard • Devices
Actions	• None

Band 8c and Above (1 Month)

Alerts to subscribers that the re-earnable portion of salary is upcoming to ensure requirements have been met where employees are on Band 8C or above and are at the top of the band. This will alert one month ahead of the employee's increment date.

Assignment Number	Employee Name	Pay Step Date ▲ ▼	Pay Scale	Role	Organisation Name
01234567	Bloggs, Mr. Joe	14/05/2021	XR11	Administrator	000 NHS Organisation

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Requirements Dashboard Items > Alerts > NHS Band 8C and Above Alert (1 Month)
Schedule	• Monthly • First day of the month • 7.10am
Condition	• The Alert will be delivered if NHS Band 8C and Above (1 Month) returns one or more rows
Delivery Content	• Band 8c and Above (1 Month) analysis • Excel Attachment
Recipients	Available for subscription to: XXX Administrator Self Service (Payroll Approvals Not Required) XXX Administrator Self Service (Payroll Approvals Required) XXX BI Administration 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 Supervisor Self Service XXX Supervisor Self Service (Limited Access)
Destination	• Homepage and Dashboard • Devices
Actions	• None

Band 8c and Above (4 Months)

Alerts to subscribers that the re-earnable portion of salary is upcoming to ensure requirements have been met where employees are on Band 8C or above and are at the top of the band. This will alert four months ahead of the employee's increment date.

Assignment Number	Employee Name	Pay Step Date ▲ ▽	Pay Scale	Role	Organisation Name
01234567	Bloggs, Mr. Joe	14/05/2021	XR11	Administrator	000 NHS Organisation

Object Location	Shared Folders > NHS Standard Dashboards > NHS Staff Requirements Dashboard Items > Alerts > NHS Band 8C and Above Alert (4 Months)
Schedule	• Monthly • First day of the month • • 7.10am
Condition	• The Alert will be delivered if NHS Band 8C and Above (4 Months) returns one or more rows
Delivery Content	• Band 8c and Above (4 month) analysis • Excel Attachment
Recipients	Available for subscription to: XXX Administrator Self Service (Payroll Approvals Not Required) XXX Administrator Self Service (Payroll Approvals Required) XXX BI Administration 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 Supervisor Self Service XXX Supervisor Self Service (Limited Access)
Destination	• Homepage and Dashboard • Devices
Actions	• None