This document details the reports which can be run in ESR Business Intelligence (ESR BI) to provide the data required for the measures detailed in each header.

Security is applied to each of the dashboards detailed, however the ‘BI Administrator’ in each organisation will have access to all dashboards/reports.

Most reports have ‘column selectors’ which allow organisations to select which data items to include in the analysis – these are mostly used for Organisation Levels. Users will need to choose which organisation levels represent their ‘Ward’ level to ensure the ward names are returned in each report (these are seen as ‘Org Level 1-13’ in the tables below).

## Nursing turnover (by ward), Nursing leaver rate (by ward), stability index

A list of people who have been terminated over a period of time can be obtained from the report:

NHS Staff Movements Dashboard -> Leavers Tab

This contains the following columns:

|  |  |
| --- | --- |
| 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) |
| Assignment Number | Address Line 1 |
| FTE | Address Line 2 |
| Organisation | Address Line 3 |
| Length of Service (Months) | Town or City |
| Length of Service (Years) | County |
| Destination on Leaving | Postal Code |
| Termination Date | Religious Belief (not available in HRSS) |
| Leaving Reason | Marital Status (not available in HRSS) |
| Staff Group | Sexual Orientation (not available in HRSS) |
| Frequency | Gender (not available in HRSS) |
| Assignment Category | Role |
| 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 |  |

To obtain a list of people in post at specific effective dates (to obtain average headcount) can be obtained from the following report:

NHS Staff in Post Dashboard -> Staff in Post Tab

This contains the following columns:

|  |  |
| --- | --- |
| Last Name | Assignment Status |
| First Name | Primary |
| Title | FTE |
| Assignment Number | Organisation |
| Employee Number | Org L1-13 x 4 |
| Position Title | Occupation Code |
| Role | Incremental Date |
| Staff Group | Fixed Term End Date |
| Assignment Category | Fixed Term End Reason |

## Staff sickness (by ward)

A list of people absence with sickness can be obtained from:

NHS Absence Dashboard-> Detail Tab

This contains the following columns:

|  |  |
| --- | --- |
| Assignment Number | Actual Termination Date |
| Last Name | Days to Nil Pay |
| Middle Name | Calendar Days Lost |
| First Name | Working Days Lost |
| Title | Hours Lost |
| Organisation | FTE |
| Staff Group | FTE Days Lost |
| Occupation Code | No of Episodes |
| Role | Predicted Fitness Date |
| Position Title | Work Related |
| Assignment Category | Third Party |
| Assignment Status | Return to Work Discussion Date |
| Absence Reason | Occupational Health Referral Date |
| Level 2 Absence Reason | DH Monitoring |
| Surgery Related | Classification |
| Absence Type | Absence Estimated Cost |
| Absence Start Date | Org Level 1-13 |
| Absence End Date | Cost Centre Org Level 1-12 |
| Total Duration (Days) | Sickness Absence Nil Pay Start Date |
| Total FTE Calendar Days | Sickness Absence Half Pay Start Date |
| Days to Enter | Assessment Date |
| Cost Centre | Days to Half Pay |
| Supervisor | Half Pay / Nil Pay |
| Certification Type | Notifiable Disease |
| Disability Related | Violence Related |

## Mandatory training compliance (by ward)

Training compliance in ESR is done via ‘Competencies’ which are set as requirements for each person’s position. The following report lists all requirements for all assignments and provides a ‘Match’ result.

NHS Compliance Dashboard -> Competency Matching Tab

This contains the following columns:

|  |
| --- |
| Title |
| Employee Number |
| Assignment Number |
| Employee Name |
| Email Address |
| Organisation Level 1-13 |
| Position Title |
| Position Name |
| Competency Name |
| Level Required |
| Competency Match |
| Expiry Date |
| Requirement Inherited From |
| Future Enrolment Date |
| Date Last Awarded |
| Area of Work |
| Staff Group |
| Employee Location |
| Pay Grade |

## Nurse banding (by ward) and actual nurse staffing (by ward)

A list of current staff and their grade / salary values can be obtained via the following report:

NHS Staff in Post Dashboard-> Real Time Staff List tab

Containing the following columns:

|  |  |
| --- | --- |
| Organisation Name | Primary Assignment |
| Employee Title | Legacy Payroll Number |
| First Name | Clinical Second Speciality |
| Last Name | Area of Work |
| Preferred Name | Bank Posts Held |
| Employee Full Name | Maximum Part Time Flag |
| Employee Number | Wtr Opt Out |
| Staff Group | Wtr Opt Out Date |
| Role | Cost Centre |
| Occupation Code | Position Subjective Code |
| Position Title | Management Cost |
| Position Number | CSD 3 Months |
| Start Date in Position | CSD 12 Months |
| Pay-scale | NHS Entry Date |
| Pay-scale Description | Marital Status (Core Users Only) |
| Spinal Point | Maiden Name (Core Users Only) |
| AFC Spinal Point | Previous Last Name |
| Spinal Value | Age (Core Users Only) |
| Salary Value | Birth Date (Core Users Only) |
| Incremental Date | NI Number (Core Users Only) |
| FTE | SD Number |
| Contract Hours | Email Address |
| Assignment Category | Address Line1 |
| Employee Category | Address Line2 |
| Assignment Number | Address Line3 |
| Assignment Start Date | Town or City |
| Assignment End Date | County |
| Assignment Status | NHS CRS Identifier |
| Payroll Name | NHS CRS Date Authenticated |
| Paypoint / Payroll Point | e-GIF and NHS CRS Status |
| Probation Period | Telephone Home |
| Probation Unit | Telephone Work |
| Fixed Term End Date | Telephone Mobile |
| Fixed Term Reason | TUPE Transfer |
| Department Manager | Adjusted Service Date |
| Supervisor | Original Hire Date |
| Job sharer | Latest Start Date |
| Organisation Level 1-13 | Cost Centre Organisation Level 1-12 |

planned nurse staffing (by ward)

bank and agency use (by ward)

bank and agency spend (by ward)

staff engagement survey data (by ward)

## Staff qualifications (by ward)

A list of staff and their qualifications is available at:

NHS Qualifications Dashboard->Qualifications Detail

Containing the following columns:

|  |  |
| --- | --- |
| Employee Number | Qualification Title |
| Last Name | Qualification Subject Area |
| First Name | Awarded Date |
| Title | Awarded Body |
| Role | Establishment |
| Organisation Name | Grade Attained |
| Qualification Type |  |