**DASHBOARD**

At the top we need:

Outstanding Tasks - From Onboarding Checklist, Annual Checklist - to be emailed too if outstanding

Outstanding Requests - Holiday Requests awaiting approval

Outstanding Approvals - Approvals for team members

Probation Reviews coming up

**Do not need:**

Employee strength month wise

Department strength month wise table

Attendance Activity

Department wise Strength-Last salary month

**Would like:**

Annual leave days approved by site and employee type for current month and next month

Department wise strength - is that FTE? No it is Head count

**ADMINISTRAION**

Roles - Super Admin/CMT, SMT, Dentist, Nurse, Receptionist

**SETUP**

**Do not need:**

Company / Currency / Country / Department Group / Department / Grades / Entitlement type

Salary Banks / Salary Tax Slab / Local Sale Types

**Location should be called practices**

**Religion** should also include gender identity, marital status, disability and other optional questions

**EMPLOYEE**

Employee main must have:

First/Last Name, DOB, Home Address, NI Number, Bank Details, NoK(next of kin), Medical Details ( text area), Phone Number, Email Address, Ethnicity, Gender, Role, Salary, Working Hours, Reporting to, Start Date, Length of Service, Probation Review Date

We need to make sure we have all of this for onboarding:

**Starter Checklist Form**

**P45 (Need format)** ---same as pink slip

**Curriculum Vita**

* References – minimum of two written
* Documentary evidence of qualifications relevant to the role
* Passport - to prove right to work in UK
* Driving License - photographic ID
* National Insurance Number
* Proof of Address - for fraud prevention
* Health & Safety Form
* Disability Declaration Form
* Medical History
* GDC Certificate—For dentist
* Indemnity Certificate (will need expiration date function to remind one month before it expires)
* DBS Certificate Number
* BLS Certificate - valid for 12 months
* Safeguarding Level 2 Certificate - valid for 3 years
* Safeguarding Level 3 Certificate for Managers - valid for 2 years
* IRMER Certificate – last 5 years
* CPD Log / GDC Declaration for last 36 months
* Infection Control Certificate
* Occupational Health Clearance Certificate"

**not need:**

* Employee card printing
* Local Sale

What is the difference between advance and loan - we only need one (probably advance)?

**TIME ENTRY (how many entries in a day can we monitor?)**

**Do not need:** Official Visit Entry

Can we have sickness logger too with employee giving reason for sickness in the system? Also for it to calculate Bradford Factor - see details in link: https://www.bradfordfactorcalculator.com/#how-to-calculate-the-bradford-factor

**POSTING**

It is not working on the site but can we have it so we can **upload** paylips and P60 onto the site

**Need format for payslip and P60**

**We need tabs on the left also for:**

ROTAS - can discuss later

APPRAISALS - we have forms that we need to just fill out depending on type of employee

CORRESPONDENCE - any letters we want to issue to employees

There should be some fixed with