How the Electronic Staff Record Supports Health Visitor Retention Strategies

James Haddon
Kieron Walsh
NHS ESR Development Team
Agenda

1. Right People, Right Time, Right Skills
2. What is ESR?
3. Key Features
4. ESR Business Intelligence
5. The importance of Data Quality
6. Further Information
7. Questions?
What is ESR?

- Replaced the 28 payroll and 67 HR systems previously used in the NHS
- Currently pays approximately 1.4 million employees
- Focus on Health Visitors today
  - ESR Covers all Staff Groups
Key Features

- **Self Service**
  - Managers and Employees
  - Online Payslip
  - Change of Personal Details
  - Appraisals

- **Inter-Authority Transfer**
  - Transfer Records between organisations

- **Reporting Tools**
  - ESR Business Intelligence / Dashboard Reporting
Demonstration

Self Service
Competence Requirements

Click "Search" to find certifications, courses and learning paths with the required competence

<table>
<thead>
<tr>
<th>Competence Name</th>
<th>Expiry Date</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS [MAND] Equality, Diversity and Human Rights - 3 Year</td>
<td>31-Dec-2012</td>
<td></td>
</tr>
<tr>
<td>NHS [MAND] Moving and Handling - 1 Year</td>
<td>28-Feb-2013</td>
<td></td>
</tr>
<tr>
<td>NHS [MAND] Fire Safety - 1 Year</td>
<td>31-Jul-2013</td>
<td></td>
</tr>
</tbody>
</table>

Individual Compliance Matrix

Employee Name: White, Mark
Employee Number: 20102802
Assignment: 20102802 - Health Visitor
Percentage Compliance: 40.0

<table>
<thead>
<tr>
<th>Competence Name</th>
<th>Low Level Required</th>
<th>High Level Required</th>
<th>Essential</th>
<th>Level Attained</th>
<th>Expiry Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS [CSTF] Fire Safety - 1 Year</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NHS [CSTF] Infection Prevention and Control - Level 1 Year</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NHS [MAND] Blood Transfusion - 1 Year</td>
<td>N</td>
<td></td>
<td></td>
<td>03-Apr-2015</td>
<td></td>
</tr>
<tr>
<td>NHS [MAND] Conflict Resolution - 1 Year</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NHS [MAND] Core Mandatory Training - 1 Year</td>
<td>N</td>
<td></td>
<td></td>
<td>30-Jun-2014</td>
<td></td>
</tr>
</tbody>
</table>

Key:
- Compliant with three months or more left
- Compliant with less than three months left
- Not Compliant (may be expired or at a lower level or has never had the competence, check expiry date and level attained to see which)
- Has the competence but it is not required

*No Expiry* in the expiry date field means the Employee has the competence without an end date i.e. Competence is required once only
# Access and Update Personal Information

## Personal Information

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Cole, Cecil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>200000202</td>
</tr>
</tbody>
</table>

### Basic Details

- **Full Name**: Cole, Cecil
- **Marital Status**: Single
- **Date of Birth**: 25 Dec 1980
- **NI Number**: J58794A
- **Employee Number**: 200000202
- **Work Email Address**

**TIP** To view further basic details including email address, gender and nationality, click the 'view' button.

### Phone Numbers & Personal E-Mail

- **Home**: 0115 97582519

### Main Address

- **Address Line 1**: 72 Upper Parliament Street
- **Town**: Nottingham
- **County**: Nottinghamshire
- **Post Code**: NG1 2AP
- **Country**: United Kingdom
- **Type**: Home

### Other Address

### Emergency Contacts

Enter or update information about people you want human resources to contact in the event of an emergency. You can designate more than one person as an Emergency Contact, but only one Primary Contact.
Access Online Payslip

<table>
<thead>
<tr>
<th>Period Type</th>
<th>Tax Period Number</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Month</td>
<td>7</td>
<td>25-Oct-2011</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Code</th>
<th>Tax Basis</th>
<th>NI Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>BR</td>
<td>Non Cumulative</td>
<td>D</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary of Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Gross Pay</td>
</tr>
<tr>
<td>Total Deductions</td>
</tr>
<tr>
<td>Total Amount Paid</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>No results found.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>NI D</td>
</tr>
<tr>
<td>PAYE</td>
</tr>
</tbody>
</table>
Business Intelligence

- Presents data to line and senior managers
- Easy to Use, accessible via ESR Self Service
- Centrally provided Dashboards can be used by anyone with minimal explanation
- Modern Look and Feel Entices Managers
- Locally configured Dashboards can be produced and shared with others as appropriate
Demonstration

Business Intelligence
**ESR Business Intelligence Reporting**

**NHS Health Visitor Dashboard**

**Absence Timeline**

- **Measure**: Absence % (FTE)
- **Absence % (FTE)**: 5.23%
- **Absence Days**: 4,188.0
- **Abs (FTE)**: 3,698.90
- **Avail (FTE)**: 70,741.48

**Learning Compliance**

- **Competency Framework(s)**: KSF; LANG; LOCAL; MA
- **Competencies**: (All Column Values)
- **Effective Date (Historical Dates Only)**: 18/06/2014 12:00:00

**Assignment Count**

- **Achieved**: 459
- **Compliance %**: 43.67%

**Bar Graph**

- **Staff Group**: Administrative and Clerical, Nursing and Midwifery Registered
**ESR Business Intelligence Reporting**

**NHS Health Visitor Dashboard**

**Absence Long Term / Short Term**
- **Measure**: Abs (FTE)
- **View as**: Line Graph

![Line Graph showing Absence Long Term / Short Term](image)

**Staff in Post**
- **Group by**: Age Band
- **Measure**: Headcount
- **View as**: Graph

![Bar Chart showing Staff in Post](image)

**Average Age**: 45.6 Years
### Appraisal Reviews by Staff Group

<table>
<thead>
<tr>
<th>Staff Group</th>
<th>Reviews Completed %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative and Clerical</td>
<td></td>
</tr>
<tr>
<td>Nursing and Midwifery Registered</td>
<td></td>
</tr>
</tbody>
</table>

### Appraisal Reviews by Organisation

<table>
<thead>
<tr>
<th>Org L3</th>
<th>Assignment Count</th>
<th>Reviews Completed</th>
<th>Reviews Completed %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>1</td>
<td>50.00</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>4</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td>252</td>
<td>145</td>
<td>57.54</td>
</tr>
</tbody>
</table>

**Grand Total**
- **258**
- **150**
- **58.14%**
Compliance Reporting

- Dashboard enables NHS managers to see the compliance levels of their staff quickly, easily and in a way that suits them.
Compliance Example
NHS Electronic Staff Record - Business Intelligence

Note: Organisation filtering can be found by clicking the Next button within the upper Dashboard Prompts.

Organisation(s)  (All Column Value)  Staff Group(s)  (All Column Values)  Assignment Category  Retainer Scheme; Nil  Person Type(s)  Employee; Employee

Employee Person Type(s)  (All Column Values)  Assignment Status  (All Column Values)  Occupation Code  (All Column Values)  Primary Assignments Only

* Competencies  (MAND) Information  * Days to Look Ahead  365

Compliance Expiry Timeline
Shows when assignments are due to expire with specific competencies. Click each marker on the graph to view the detail.

View as  Graph

Assignments

March 2014 - March 2015

Information Governance
The Importance of Data Quality

• Better Data Quality = Better Management Decisions
• Managers and Staff:
  – Scrutinise and use the data
  – Ensure errors are corrected
  – HV = ‘N3H’

• Workforce Specialists:
  – Use the Validation Tools in ESR Business Intelligence
    • NHS Occupation Code Verifier Tool
    • NHS Data Quality Dashboard
  – Use the WOVEN Validation tool
    • Joint HSCIC/ESR validation tool
Further Information

• ESR Website
  – http://www.esr.nhs.uk

• ESR Knowledge Base (Kbase)
  – http://www.esr.nhs.uk/kbase/

• ESR LinkedIn Group
  – https://www.linkedin.com/groups?home=&gid=7419134

• ESR Account Manager
  – http://www.esr.nhs.uk/contact-us/account-managers/
Questions?

Word Cloud generated from: