

Electronic Staff Record



Applicant Dashboard

Overview

The Applicant Dashboard enables future employees to carry out key on boarding tasks before they start employment with an organisation.

These include:

- Viewing and amending information the following information transferred to their applicant record from recruitment systems and via the Inter Authority Transfer (IAT) process from a previous employer.
 - Personal Information
 - Address and Contact Details
 - Emergency Contacts
 - Bank Account Details
 - Equality and Diversity Information
 - Qualifications
 - Professional Registrations
- Managing Compliance
- Playing e-Learning

This means that when once an applicant is hired:

- the details held against their record will be up to date with minimal paper transactions.
- training required to maintain their compliance with organisational requirements should be limited to classroom based events.
- the employee should have already had a positive experience with their new employer.

Considerations

Applicant must have one of the following Person Types:

- Applicant
- Ex-employee.Applicant

Applicant must have one of the following applicant status:

- Offer Accepted
- Offer Post Conditional
- Offer Post Unconditional

Applicants will only have access to the Applicant Dashboard.

Auto User Creation Settings

Use a setting so that accounts are created automatically for applicants with a status of Offer Accepted

Automatic Internet Access

Set to Yes so that Internet Access is created by default.

Inter Authority Transfer (IAT)

Initiating a pre-hire IAT will ensure that key information for an applicant is transferred to assist in pre-employment checks and induction planning.

Bank Account Details

Bank account details can only be viewed and updated if an Inter Authority Transfer (IAT) has been run.

Bank account details can only be updated when an applicant is connected to the NHS Network.

Applicant bank account details will only be transferred to employee records as part of the Portable Data Set Copy where they have been confirmed by the applicant.

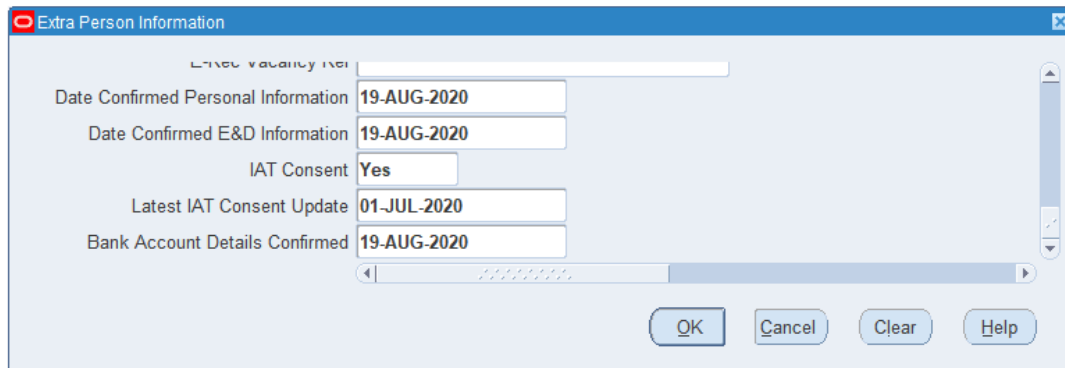
Role Holders

In addition to initiating the IAT process, to ensure that applicants can access the Applicant Dashboard and that the information held on their record is up to date, it is recommended that the following role holders are in place.

- Auto User Account Details - Role holder must be in place to ensure that accounts are automatically created.
- Applicant Details - Receives details of changes with require approval made by Applicant through the My Applicant Details Portlet
- Stat & Mand Competencies Ntf - Approves and updates competences transferred via IAT, ensuring that compliance information for an applicant is current.
- Multi-Employer Comp Update - Approves competences gained by an applicant in previous employment subsequent to initial transfer of competences via IAT.

Monitoring Applicant Updates

As applicants carry out required tasks on the Applicant Dashboard, fields on the Employment Checklist will be updated with the date when this information was confirmed.



The screenshot shows a dialog box titled "Extra Person Information" with a blue header bar. The dialog contains several input fields with the following values:

Field	Value
Date Confirmed Personal Information	19-AUG-2020
Date Confirmed E&D Information	19-AUG-2020
IAT Consent	Yes
Latest IAT Consent Update	01-JUL-2020
Bank Account Details Confirmed	19-AUG-2020

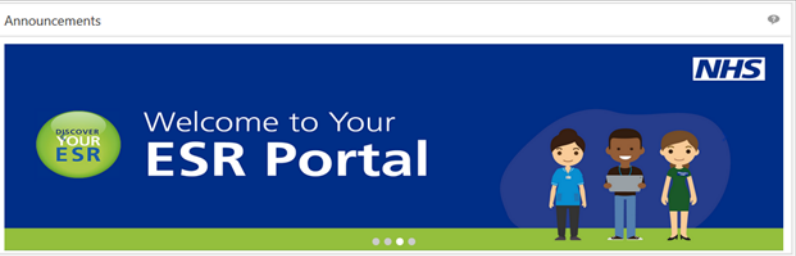
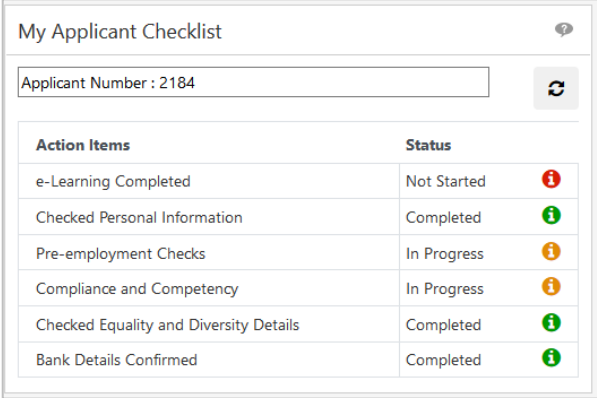
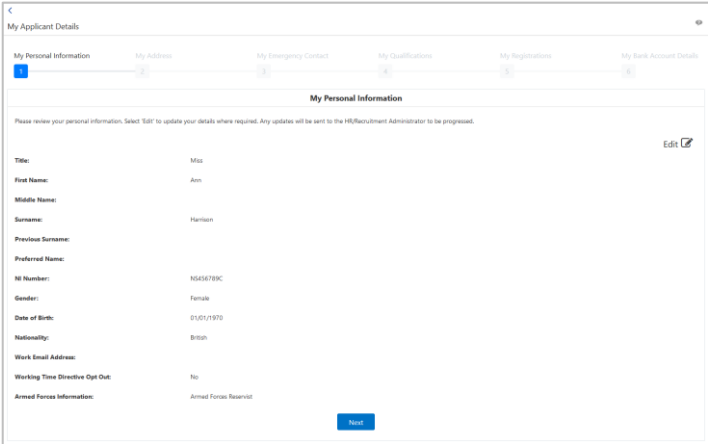
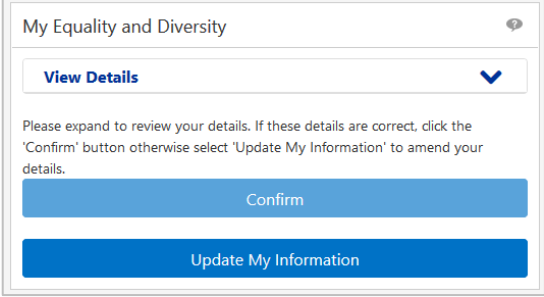
At the bottom of the dialog, there are four buttons: "OK", "Cancel", "Clear", and "Help".

This information can be reported on using the Employment Checklist Dashboard.

Information related to Compliance can be monitored using the dedicated Applicant Competency Profile and Applicant Competency Matching analysis in the Compliance Dashboard.

Updates to other information, e.g. Address and Contact Details can be monitored using the Change Event Log.

What It Looks Like

Portlet	Screenshot														
<p>Announcements</p> <p>Applicants can view Announcements linked to National and Local campaigns.</p>															
<p>My Applicant Checklist</p> <p>Allows applicants to monitor progress against actions related to their upcoming employment.</p>	 <table border="1"> <thead> <tr> <th>Action Items</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>e-Learning Completed</td> <td>Not Started ❗</td> </tr> <tr> <td>Checked Personal Information</td> <td>Completed ✅</td> </tr> <tr> <td>Pre-employment Checks</td> <td>In Progress ⚠️</td> </tr> <tr> <td>Compliance and Competency</td> <td>In Progress ⚠️</td> </tr> <tr> <td>Checked Equality and Diversity Details</td> <td>Completed ✅</td> </tr> <tr> <td>Bank Details Confirmed</td> <td>Completed ✅</td> </tr> </tbody> </table>	Action Items	Status	e-Learning Completed	Not Started ❗	Checked Personal Information	Completed ✅	Pre-employment Checks	In Progress ⚠️	Compliance and Competency	In Progress ⚠️	Checked Equality and Diversity Details	Completed ✅	Bank Details Confirmed	Completed ✅
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<p>My Applicant Details</p> <p>Allows an applicant to view and update Personal Information, Address Details, Emergency Contact and transferred Bank Account Details, view Qualifications and Professional Registration details.</p>															
<p>My Equality and Diversity</p> <p>Allows applicant to view and update their Equality and Diversity information.</p>															

My Compliance

Allows applicants to play and search for e-Learning that will maintain their compliance against organisational requirements.

My Compliance

Assignments:

2184 - Staff Nurse

Percentage Compliance: 83%

Competency Name	Status
<input type="radio"/> Information Governance and Data Security - 1 Year	
<input type="radio"/> Fire Safety - 1 Year	

[Play](#) [Search](#) [View](#)

1

My e-Learning

Allows applicant to play e-Learning they have been enrolled on for Induction purposes.

My e-Learning

Show mandatory learning only **YES**

000 Data Security Awareness Level 1

[Play](#)

Status: **Not Attempted**

[Learner Homepage](#)

Further Information/Help

Free text portlet which can be edited to signpost applicants to key contacts.

Further Information/Help

If you have any queries regarding your application, please contact your HR/Recruitment Administrator.

Telephone Number: 01924 123456

Email Address: recruitment@org.nhs.uk

Recruitment Process Reporting

There are several ESR Business Intelligence Dashboards and analyses which can provide an insight into applicant data quality and applicant management.

NHS Data Quality Dashboard

Applicant Tab

The Applicant tab on the NHS Data Quality Dashboard is designed to provide a list of applicants where it is identified that data is has not been completed or where certain criteria is met.

For example there are analyses which returns applicants where the following data items are missing:

- Date of Birth
- Disability
- Ethnic Origin
- Sexual Orientation
- Religious Belief

There is also an analysis which shows that the applicant is over 80 years old.

NHS Employment Checklist Dashboard

The Employment Checklist Dashboard has been designed to provide information based on the Employment Checklist data in ESR.

The Dashboard includes the fields:

- Pre –employment Checks Complete
- Date Confirmed Personal Information
- Date Confirmed Equality and Diversity Information

The above fields are also included on the Employment Checks page of the NHS Recruitment Dashboard.

Checklist Detail Tab

The Checklist Detail tab provides detailed information recorded on the ESR Employment Checklist form including Reference details, Visa details, details of Right to Work checks and The Disclosure and Barring Service (DBS).

NHS Recruitment Dashboard

The Dashboard shows the Mandatory Employment Checklist Status for Applicants as at an effective date.

Employment Checks Tab

The employment checks tab shows the status of the following checks:

- ID Checks
- Right to Work
- Professional Registration and Qualifications
- Reference and Employment History
- DBS
- Medical Checks

Consent and Bank Account Confirmation

The applicant IAT Consent and Bank Account Confirmation Details fields are available in the EIT Employment Checklist Details folder within the Applicant EIT Details subject area of ESR Business Intelligence.

NHS IAT Dashboard

This dashboard provides organisations with IAT usage information. This includes number of IATs run, length of time to return IAT requests and source organisation.

Detail

The Detail analysis is designed to show full details of all IATs returned within a defined period. This includes:

- Date IAT Initiated
- OH Notification Received
- PDS Requested Date
- Std Reference Request Returned Date
- Stat and Mand Competency Notification Received
- Stat and Mand Competency Notification Actioned Date

IAT Progress

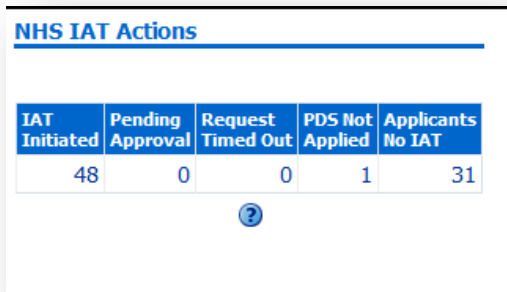
The IAT Progress analysis shows how an IAT has progressed across the date period defined by a user.

NHS IAT Actions

To further support analysis the IAT Actions Portlet highlights where actions may need to be taken regarding existing IAT runs or where an IAT has not been initiated. The Portlet can be added as a Configurable BI Portlet. Guidance on how to add a Configurable is available in the User Manual. Click [here to access](#).

The Portlet displays the number of:

- IATs Initiated
- IATs Pending Approval
- IAT Requests Timed Out
- IATs where an employee has been hired within the last 14 days but the PDS has not been applied with 7 days of hire
- Applications where an IAT has not been initiated



IAT Initiated	Pending Approval	Request Timed Out	PDS Not Applied	Applicants No IAT
48	0	0	1	31

Further Information



Where can I obtain further support and guidance?



Contact your regional [NHS ESR Functional Account Manager](#).