

Electronic Staff Record

Employee Self Service functional guide

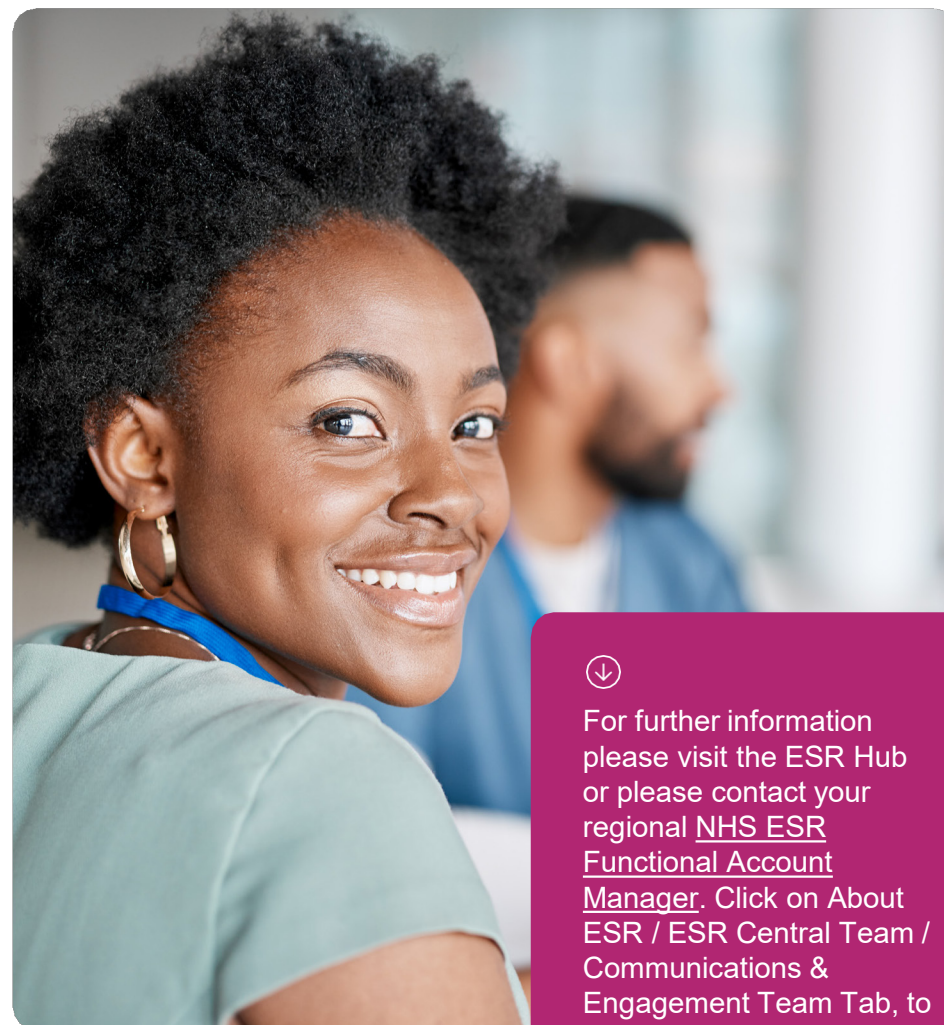
Employee Self Service creates a sense of independence, empowerment and control for NHS employees.

The ability for employees to view and edit their own data is key to ensuring good data quality and ownership. Providing employees with remote access allows them to view their personal information in ESR and to edit their own data, at a time of their choosing, without being connected to work networks. The ability for employees to manage their own data enables the Workforce/HR/Recruitment Teams to focus on other activities rather than data input.

Self Service within ESR enables any employees and managers to have access to ESR at a time of their choosing, either at work via the HSCN access route or through any device that can access the internet. Employees have the option to use extra security when logging in over the internet by opting into Multi Factor Authentication and registering a mobile device.

Employees can view and update personal information, request flexible working, view details about pay and rewards and participate in learning opportunities available from their organisation. The ESR Portal displays a range of Portlets containing key information for employees such as Equality & Diversity, Payslips, Annual Leave and Absence details.

This guide is designed to outline the full range of functionality available within Employee Self Service.



For further information please visit the ESR Hub or please contact your regional [NHS ESR Functional Account Manager](#). Click on About ESR / ESR Central Team / Communications & Engagement Team Tab, to find your regional contacts.

1 Employee Self Service has two levels

The solution has a choice of two levels of access for employees which provides flexibility to an organisation to respond to internal choice within the organisation.


Employee Self Service

Employee Self Service enables an employee to update and change personal information, wellbeing information, address and emergency contact/next of kin details. In addition, employees can enter or amend Bank Account Details, view payslips/ P60's, request Flexible Working arrangements or declare a Conflict of Interest. It also enables staff to enrol themselves on classes, play e-Learning, create their own Learning Paths, create/participate in appraisals and other reviews (eg Supervision, Health & Wellbeing). Employees also have the ability to hand in their notice by initiating their own End Employment/End Non-Primary Assignment which can improve data quality for Reason for Leaving/Destination on Leaving data whilst also reducing overpayments from late notification of terminations and providing enough time for the completion of an Exit Questionnaire.

Employees cannot make changes to their own Assignment information, however, they can view their details, including the department in which they work, the position they hold and their working conditions.

Employee Self Service (Limited access)

This Limited Access level is based upon standard Supervisor Self Service and does not require NHS CRS Smartcard Access. Holders of this access will not be able to perform changes which would usually be subject to RA approvals.

 Click [here](#) to refer to the ESR Self Service Best Practice Guide for more detail and information around Self Service.

2 ESR Portal

The My ESR dashboard is the default view for all users when accessing the Portal. It contains a number of key features such as links to Notifications, Settings and Portlets. To access the ESR Portal, all users require either a smartcard, or Username and Password login details. Click [here](#) for how to guides for employees.

Once landed on the ESR Portal, you will see the set up pre-determined by the Portal Administrator in your organisation. There are a number of Portlets available in the library for Administrators to choose from. Portlets provide easy access to your information and direct links to the relevant Self Service forms where applicable.

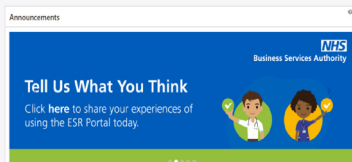
Want more customisation?

Remember, the Portal Administrator and Content Editor have the ability to change colour schemes, post bespoke messaging and actually allow staff to manage their own home page and add portlets themselves from the library!



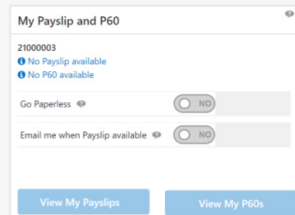
3 What Portlets are available nationally?

→ Announcements



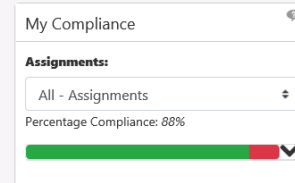
The Announcements Portlet can contain both local and national messages. The latest 20 messages will rotate automatically.

→ Payslips/ P60's



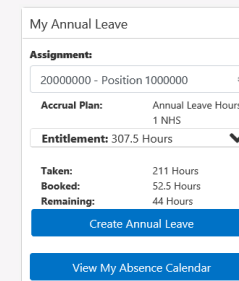
This Portlet enables the employee to view Payslips and P60s. P11d's will also be available in April 2024.

→ My Compliance



This Portlet lets the employee view their compliance status and play e-learning and search for classroom courses when required.

→ My Annual Leave



This Portlet allows the employee to book and view annual leave and/or bank holidays.

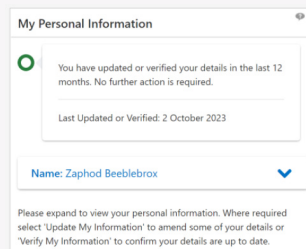
3 What Portlets are available nationally?

→ Total Rewards



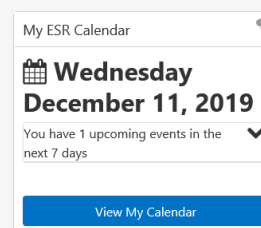
Clicking on the View My TRS button will open a new window showing the Total Reward Statement (inc. Pension information).

→ My Personal Information



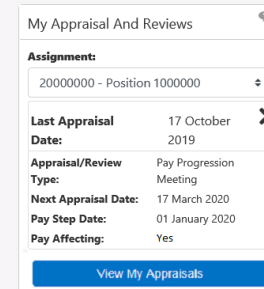
This will take the employee to the Personal Information page in ESR where all information and updates can be made. It highlights when an employee should review and update/confirm details.

→ My ESR Calendar



The My ESR Calendar will display upcoming events relevant to the employee in the next 7 days.

→ My Appraisals and Reviews



This is designed to provide summary details of the latest Appraisal Review and information on the next Increment event.

3 What Portlets are available nationally?

→ My Employment

The screenshot shows the 'My Employment' portlet with a 'View Details' button at the top right. Below it, the 'Assignment:' field is expanded to show '50505050 - Position 5666666'. Other details include 'Service in Current Employment: 9.16 Year(s)', 'Organisation: 508 Organisation', 'Job: Administrative and Clerical/Senior Manager', 'Supervisor: Smith, Mr. Ben', 'Assignment Start Date: 01 May 2017', and 'Grade: XN11'. A 'View More Information' button is at the bottom.

The portlet displays a number of data items for the employee's assignment(s)

→ My Equality and Diversity

The screenshot shows the 'My Equality and Diversity' portlet with a red warning icon and the message: 'You have not verified your details. Please update or verify your details to ensure they are up to date.' Below this is a 'Last Updated or Verified:' field. A 'View Details' button with a downward arrow is at the bottom. A note at the bottom of the portlet reads: 'Please expand to view your details. Where required select 'Update My Information' to amend some of your details or 'Verify My Information' to confirm your details are up to date.'

This Portlet contains protected characteristics relating to the employee. It highlights when an employee should review and update/confirm details.

→ Twitter

The screenshot shows the 'Twitter' portlet displaying a tweet from @nhsesr. The tweet text is: 'We've got a great opportunity to join our Regional Team in the East Mids & E of England. If you have excellent ESR knowledge, strong stakeholder engagement skills & a passion for NHS workforce, check out our latest vacancy bit.ly/EMidsEdofEngland @NHSBSA @Scott2Maria'. The tweet is dated '4 Dec 2019'.

The Twitter Portlet can display a Twitter feed as defined locally by the local organisation.

→ Local Links

The screenshot shows the 'Local Links' portlet with a search icon at the top right. A single link is displayed: 'ESR Education Online'.

The Local Links Portlet can be used to increase accessibility and visibility of the local links available to users.

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Want to know more? Let's look at some of the Portlets in more detail...

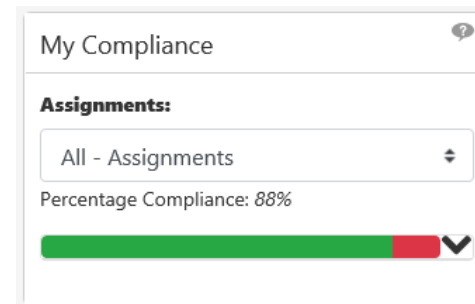
My Compliance

This Portlet provides a compliance summary across all of an employee's assignment. If there is more than one assignment, the assignments available in the dropdown menu are listed in order of the least compliant assignment to the most compliant assignment.

If the employee is not fully compliant the percentage compliance indicator bar will show the green aspect of the bar progressively increasing towards 100% compliance, reducing the red portion.

This Portlet has the ability to play e-Learning, automatically renew associated Learning Certifications and search for learning in classrooms.

Competencies need to be set up as a requirement by the organisation for this functionality to be fully effective.



My Compliance

Ability to view personal compliance, with direct links to how to complete training if non-compliant.

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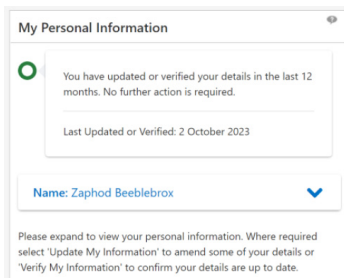
Want to know more? Let's look at some of the Portlets in more detail...

My Personal Information

This Portlet expands and collapses. If the Portlet is collapsed, only the employee's picture (where available) and name is displayed. This is to keep personal information within the Portlet private. If the Portlet is expanded, the employees Address, Home (Number), Mobile (Number) and Position will be displayed (where available). Clicking the **Update My Personal Information** button will take the employee to the Personal Information page in ESR where all information and updates can be made.

The Portlet also includes the option for employees to view and update My Wellbeing Information which includes options for Armed Forces and Working Carer.

They can also view their Immunisations and Checks data held in ESR; this information presented is read only and displays the latest immunisation and vaccination history recorded within the XXX Occupational Health Administrator responsibility under Immunisations and Checks.



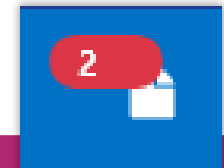
My Personal Information

Personal information relating to the employee with a RAG rated indicator to highlight when an employee needs to review/check their data annually.

Notifications

Notifications relate to updates to data within system. These include changes to information such as absence requests, learning and expiries. As well as being available directly in ESR, these are also delivered directly to the employee's email inbox.

It's recommended that an appropriate email address is recorded. Ideally, but not exclusively, this should either be nhs.net or an approved secure domain. Some notifications are actionable directly via the email.



View & Action Notifications

Ability to view changes to an individual's records and either action within notification or email.

4 Want to know more? Let's look at some of the Portlets in more detail...

Appraisals and Reviews

This Portlet provides prompts to encourage appraisal activity in the system. It allows employees to check when appraisals are due, and also to monitor their responsibilities around pay progression, looking at when the next pay affecting pay point is, and when their review dates are.

Pay Affecting:	Top of Band
Last Appraisal Date:	None Recorded >
Appraisal/Review Type:	None Recorded
Next Appraisal Date:	None Recorded

My Appraisal And Reviews	
Assignment: 20000000 - Position 1000000	
Last Appraisal Date:	17 October 2019 >
Appraisal/Review Type:	Pay Progression Meeting
Next Appraisal Date:	17 March 2020
Pay Step Date:	01 January 2020
Pay Affecting:	Yes
View My Appraisals	

Appraisals and Reviews

Provides summary details of the latest Appraisal Review and information on the next Increment event.

My Employment

The Portlet displays the following information for the employee's assignment(s) (defaulted to primary assignment if there is more than one):

- Service in Current Employment
- Organisation
- Job
- Supervisor
- Assignment Start Date
- Grade
- Working frequency and metric e.g. 37.5 hours per week, 10 sessions per week
- Pay Step x of y, e.g. Pay Step 14 of 17
- Pay Step Date (i.e. Incremental Date)

Clicking the **View More Information** button will display the following:

- Aggregate Service Years
- Aggregate Service Days
- CSD 1 Week
- CSD 3 Months
- CSD 12 Months
- NHS Entry Date

My Employment	
View Details >	
Assignment: 50505050 - Position 5666666	
Service in Current Employment:	9.16 Year(s)
Organisation:	508 Organisation Administrative and Clerical/Senior Manager
Job:	
Supervisor:	Smith, Mr. Ben
Assignment Start Date:	01 May 2017
Grade:	XX11
View More Information	

My Employment

Information relating to the employee's assignments.

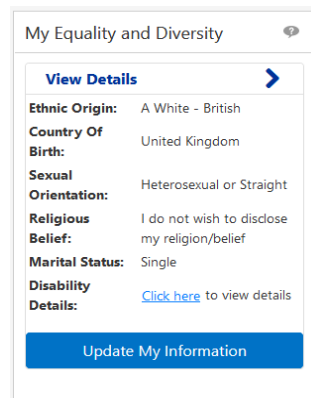
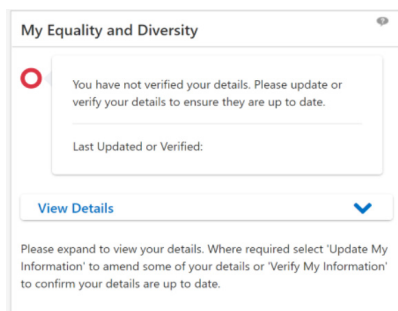
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My Equality and Diversity

This Portlet expands and collapses as it contains protected characteristics. Clicking the **View Details** dropdown arrow will display the following information:

- Ethnic Origin
- Country of Birth
- Sexual Orientation
- Religious Belief
- Marital Status
- Disability Details

Clicking the **Update My Information** button will open a window where the relevant details can be updated as required. The portlet has a RAG rated indicator to highlight when an employee should review/check their information annually.



Employee Access

ESR is available both over HSCN and over the internet. It is also accessible over multiple devices including laptops, smartphones and tablets. Employees have the option to use extra security when logging in over the internet by opting into Multi Factor Authentication and registering a mobile device.

