
THE ELECTRONIC STAFF RECORD PROGRAMME



NATIONAL HEALTH SERVICE

ESR-NHS0252 NHS EMAIL NOTIFICATIONS

Information Classification:Restricted: PUBLIC

Owner:	Chris Moorley
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Version:	5.0

Approvals:

Name	Nick Adcock
Title	Development Manager

1. DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
25/01/2017	Matt Lye	0.1	New document
01/08/2017	Matt Lye	0.2	Updates to processes
21/09/2017	Matt Lye	1.0	Uplifted to version 1.0
16/04/2018	Matt Lye	1.1	R38 Changes, ESR BI Alerting
20/07/2018	Matt Lye	1.2	R39 Changes
23/10/2018	Matt Lye	1.3	R40 Changes
10/01/2019	Matt Lye	1.4	Reviewed against R41, updates to screenshots
01/04/2019	Matt Lye	1.5	R42 Changes
11/10/2019	Matt Lye	1.6	R43 Changes
09/01/2020	Matt Lye	1.7	R44 Reviewed. No Updates Required
09/01/2020	Nick Adcock	2.0	Approved and Uplifted
18/03/2020	Matt Lye	2.1	Reviewed against R45, Changes to secure email provider
30/04/2020	Matt Lye	2.2	Further updates on Secure email provider
20/05/2020	Nick Adcock	3.0	Approved and Uplifted
17/09/2021	Matt Lye	3.1	Reviewed against R51
23/03/2022	Nick Adcock	4.0	Approved and Uplifted
04/05/2022	Tumi Mafe	5.0	Information classification change only

REVIEWERS

Name	Position
NHS Development Team	
NHS Functional Account Managers	

DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

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3. INTRODUCTION

This document is a guide to the email functionality delivered by the ESR system. The document outlines:

- The requirements that must be in place for users to receive email notifications.
- The types of email that users will receive.
- The processes that will deliver emails to users.

4. EMAIL NOTIFICATIONS OVERVIEW

ESR provides the ability to approve, reject or request more information directly from a secure email account. There are two levels of email capability dependent on email domain security:

- Approval and summary emails – available to NHS.net and other approved secure domains;
- Summary email - other email domains outside an approved list.

ESR users have the ability to:

Receive Workflow Notifications via email (outbound For Your Information (FYI), For Your Action (FYA) and Summary) generated from ESR.

NHS ESR users, on receipt of an FYA email notification can take inbound actions such as Approve, Reject and Request for Information from the email notification. On receipt of the email response the workflow will be progressed within ESR based on the incoming action.

Where a VPD is SPINE enabled and where a notification will update a data item that triggers the SPINE Interface and the transaction requires additional workflow approval, the outbound FYA email will be suppressed and a secure FYI email will be sent to the user informing of the transaction and to login to ESR to take the required action.

Workflow Email Notifications will be sent to the email address held on the Office Details tab against the Person Record of the intended recipient.

4.1. SECURE EMAIL DOMAINS

For FYI and FYA emails to be delivered from ESR, the email system must meet the current Secure Email Standard (ISB 1596) which establishes the minimum security requirements for email systems in health, public health and adult social care. Organisations that use NHSmail automatically meet this requirement, Office 365 meets the requirement but organisations must register compliance with the NHSmail and include confirmation that the email service has been configured to securely communicate with NHSmail.

More information on this standard and how organisations can meet this standard is available here - <https://digital.nhs.uk/services/nhsmail/the-secure-email-standard>

The government systems that currently meet this standard are listed below

Sector	Domain
Health and Social Care	.nhs.net
Local Government / Social Services	.gcsx.gov.uk
Central Government	.gsi.gov.uk
Central Government	.dhsc.gov.uk
Central Government	.gse.gov.uk
Central Government	.gsx.gov.uk
Criminal and Justice	.cjsm.net
Criminal and Justice	.scn.gov.uk
Criminal and Justice	.pnn.police.uk
Military	.mod.uk

Where the email system being used by an organisation is not secure, emails will be prefixed with the word [Secure]. This encrypts the email with the contents only accessible by using NHS Mail's Egress Encryption Service. More information about this feature can be found on the NHS Mail help website - <https://support.nhs.net/article-categories/encryption/> in the Accessing Encrypted Emails Guide for non-NHSmail users section. The steps to sign up for this solution are covered in section 4.4

4.2. EMAIL PREFERENCES

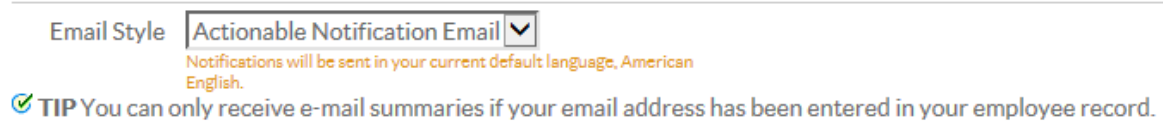
The options available for the receipt of emails can be found in the Preferences section of ESR (N > Preferences > Notifications > Email Style).



The options available will be dictated by the email domain of the user e.g. `firstname.lastname@domain.net`. Where the domain is classed as a secure email i.e. `@nhs.net`, then the following options will be available:

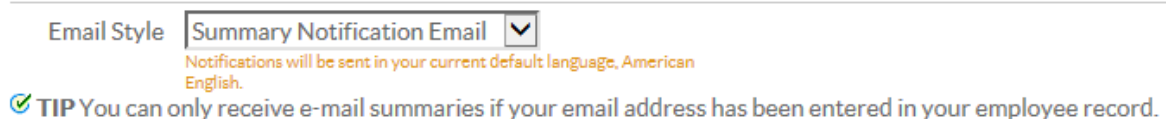
- Actionable Notification Email
- Summary Notification Email
- Do not send me mail

Notifications



Where the user does not have a secure email domain then the option to Actionable Notification E mail will not be available.

Notifications




An overnight summary email will be provided with more detailed information including notification type and who it relates to.

4.3. EMAIL TYPES

4.3.1. For Your Information

Leave of Absence has been forwarded to Leese, Vivian

[← REPLY](#) [← REPLY ALL](#) [→ FORWARD](#) [☰](#)


PRODUCTION WORKFLOW, Esr (ELECTRONIC STAFF RECORD)
 Fri 11/01/2019 12:11

Mark as unread

To: JACKSON, Sam (ESR HOSPITAL)

From: SYSADMIN
 To: Jackson, Sam
 Sent: 11-JAN-2019 12:10:46
 ID: 559092070

Last Approver: Jackson, Sam
 User Name: 5045JACKSON01
 Comments: As discussed

Next Approver: Leese, Vivian
 User Name: 504VLEESE01

This notification is for information only.

4.3.2. For Your Action

Action Required: Leave of Absence for Jackson, Sam

[✕ DELETE](#) [← REPLY](#) [← REPLY ALL](#) [→ FORWARD](#) [☰](#)


PRODUCTION WORKFLOW, Esr(ELECTRONIC STAFF RECORD)
 Mon 28/01/2019 17:05

Mark as unread

To: LEESE, Vivian (ESR HOSPITAL)

From: Jackson, Sam
 To: Leese, Vivian
 Sent: 14-Nov-2018 14:48:25
 Due: 12-Dec-2018 14:48:25
 ID: 322488158

Attachments

Employee Name: Jackson, Mr. Sam
 Employee Number: 200959980

Absence Details

Proposed	
Absence Status	Confirmed
Absence Type	Annual Leave Hours 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	13-Dec-2018
End Date	14-Dec-2018
Hours	15
Comments	As discussed

View Entitlement Balances

View Entitlement Balance

Supporting Documents

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found								

Action History

Num	Action Date	Action	From	To	Details
1	14-Nov-2018 14:48:25	Submit	Jackson, Sam	Leese, Vivian	

Related Applications

[Return For Correction](#)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.
 Action: [Approve](#) [Reject](#) [Request Information](#)

Options available from a FYA email are as follows:

- Approve
- Reject
- Request Information

Note

When responding to notifications the following must be adhered to:

- No changes must be made to the email address that notifications are sent to.
- No changes must be made to the Subject of the email.
- Action for the response must not be changed.
- Responses must be entered between the quotes where guided.
- No other text must be entered in the body of the email.

The options available are outlined below:

Clicking Approve

SEND
 DISCARD
 INSERT

To: esr.wfmPROD@nhs.net +

Cc:

Subject: Action Required: Leave of Absence for Jackson, Sam

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Action: 'Approve'

Comments From Last Approver
Note: 'Record Your Approving Comments Here'

NID[522488158/230756288643819876862578962710449188849@WFMAIL]

This will generate the following e-mail to the requestor

Leave of Absence for Jackson, Sam has been approved.

REPLY
 REPLY ALL
 FORWARD

PRODUCTION WORKFLOW, Esr (ELECTRONIC STAFF RECORD)
 Wed 16/01/2019 11:32 Mark as unread

To: JACKSON, Sam (ESR HOSPITAL);

From: SYSADMIN Attachments
 To: Jackson, Sam
 Sent: 16-Jan-2019 09:59:42
 ID: 562213671

Employee Name: Jackson, Mr. Sam
 Employee Number: 20095980

Absence Details

	Proposed
Absence Status	Confirmed
Absence Type	Annual Leave Hours 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	18-Feb-2019
End Date	22-Feb-2019
Hours	37.5
Comments	As discussed

View Entitlement Balances

[View Entitlement Balance](#)

Supporting Documents

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Action History

Sequence	Name	Action	Date	Notes
1	Jackson, Sam	Submit	11-Jan-2019 12:10:43	
2	Leese, Vivian	Approve	16-Jan-2019 09:59:38	

Related Action History

Num	Action Date	Action	From	To	Details
1	16-Jan-2019 09:59:42	Submit	SYSADMIN	Jackson, Sam	

Reject

SEND
 DISCARD
 INSERT
 ...

To: esr.wfmPROD@nhs.net

Cc:

Subject: Action Required: Leave of Absence for Jackson, Sam

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Action: 'Reject'

Comments From Last Approver
 Note: 'Record Your Rejection Comments Here'

NID[522488158/230756288643819876862578962710449188849@WFMAIL]

The requestor will receive the following

Leese, Vivian rejected your Leave of Absence changes for Jackson, Sam.

REPLY
 REPLY ALL
 FORWARD
 ...

Mark as unread

PRODUCTION WORKFLOW, Esr (ELECTRONIC STAFF RECORD)
 Wed 16/01/2019 11:32

To: JACKSON, Sam (ESR HOSPITAL);

From: SYSADMIN
 To: Jackson, Sam
 Sent: 16-Jan-2019 09:59:42
 ID: 562213671

Attachments

Employee Name: Jackson, Mr. Sam
 Employee Number: 20095980

Absence Details

Proposed	
Absence Status	Confirmed
Absence Type	Annual Leave Hours 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	18-Feb-2019
End Date	22-Feb-2019
Hours	37.5
Comments	As discussed

View Entitlement Balances
View Entitlement Balance

Supporting Documents

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Action History

Sequence	Name	Action	Date	Notes
1	Jackson, Sam	Submit	11-Jan-2019 12:10:43	
2	Leese, Vivian	Reject	16-Jan-2019 09:59:38	As discussed I have rejected this leave request

Related Action History

Num	Action Date	Action	From	To	Details
1	16-Jan-2019 09:59:42	Submit	SYSADMIN	Jackson, Sam	

Request Information

✉ SEND
✕ DISCARD
📎 INSERT
⋮

To: esr.wfmPROD@nhs.net

Cc:

Subject: More Information Requested: Action Required: Leave of Absence for Jackson, Sam

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Request more information from: '504SJACKSON01'
 Question: 'Enter your question here'

NID[522488158/230756288643819876862578962710449188849@WFMAIL][3]

This will then send an email to the original requestor

More Information Request: Leave of Absence for Jackson, Sam

✕ DELETE
↩ REPLY
↶ REPLY ALL
➦ FORWARD
⋮

PRODUCTION WORKFLOW, Esr (ELECTRONIC STAFF RECORD)

Thu 07/02/2019 10:59

Mark as unread

To: JACKSON, Sam (ESR Hospital);

Question: **Have you arranged suitable cover during this absence? Thanks**

Please click on the following link to automatically generate an E-mail response for this question. Before sending the E-mail response, ensure desired comments within quotes.

[Answer Question](#)

Notification Details:

Information

Leese, Vivian has requested information: Have you arranged suitable cover during this absence? Thanks

From Leese, Vivian
To Jackson, Sam
Sent 07-Feb-2019 10:59:25
Due 27-Feb-2019 14:01:33
ID 570912747

Attachments

Employee Name Jackson, Mr. Sam
Employee Number 20095980

Absence Details

Proposed	
Absence Status	Confirmed
Absence Type	Annual Leave Hours 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	15-Apr-2019
End Date	18-Apr-2019
Hours	30
Comments	As discussed

View Entitlement Balances
View Entitlement Balance

Supporting Documents

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Action History

Num	Action Date	Action	From	To	Details
1	30-Jan-2019 14:01:33	Submit	Jackson, Sam	Leese, Vivian	
2	30-Jan-2019 14:20:54	Request Information	Leese, Vivian	Jackson, Sam	Have you arranged suitable cover during this absence? Thanks.

Who can respond

To: esr.wfmPROD@nhs.net

Cc:

Subject: Request Information: More Information Request: Leave of Absence for Jackson, Sam

Calibri 12 B I U List Bulleted List Numbered List Decrease Indent Increase Indent Undo Redo Font Color Background Color Calendar

Question : 'Have you arranged suitable cover during this absence? Thanks'
Answer: 'Enter your answer here'

NID[570912747/50148669185632553102854210435453251644@WFMAIL][4]

4.3.3. For Your Action (Suppressed)

Where the requests that are being made will change information on the SPINE, an approver will receive an email informing them that they will need to login to ESR to approve the change.

Action Required: NHS Employee Personal Information Process for Jackson, Sam

DELETE REPLY REPLY ALL FORWARD



PRODUCTION WORKFLOW, ESR (ELECTRONIC STAFF RECORD)
Thu 07/02/2019 09:42

Mark as unread

To: LEESE, Vivian (ESR HOSPITAL);

Notification NID 573210615

This notification contains secure content which cannot be sent through email. Please access the online version of this notification to see the details.

4.3.4. Summary

[Secure] You Have Open ESR Notifications - Please log in to ESR to view. Do Not Reply to this mail.

DELETE REPLY REPLY ALL FORWARD



PRODUCTION WORKFLOW, ESR (ELECTRONIC STAFF RECORD)
Sat 26/01/2019 20:02

Mark as unread

To: JACKSON, Sam (ESR HOSPITAL);

You have 2 new open ESR notifications. Please log into ESR <https://my.esr.nhs.uk/> to review and action your notifications as appropriate. Please do not reply to this email.

Notification Summary:

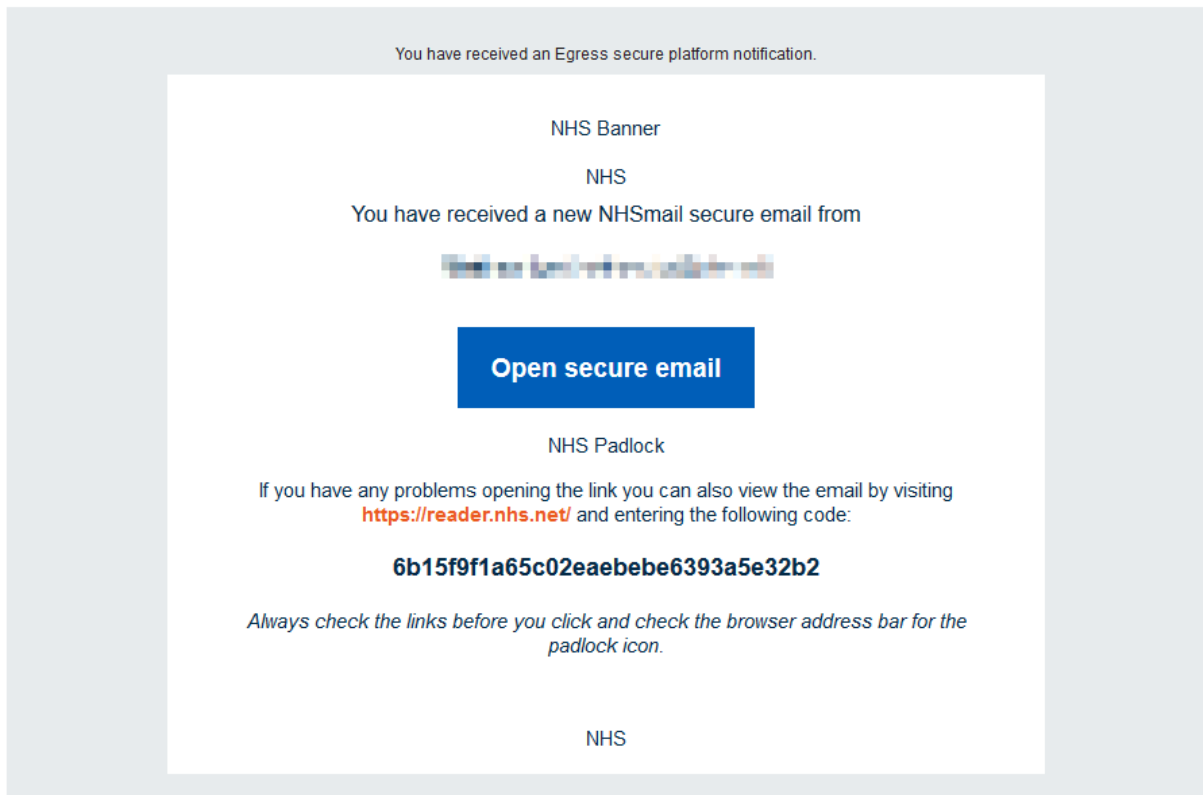
- (1) You have successfully enrolled in the class.
- (2) FYI: Leese, Vivian rejected your Leave of Absence changes for Jackson, Sam

4.4. SECURE EMAILS

Where the email domain is not classified as secure, e-mails will be prefixed with [Secure].

To view the body of the e-mail follow the steps below:

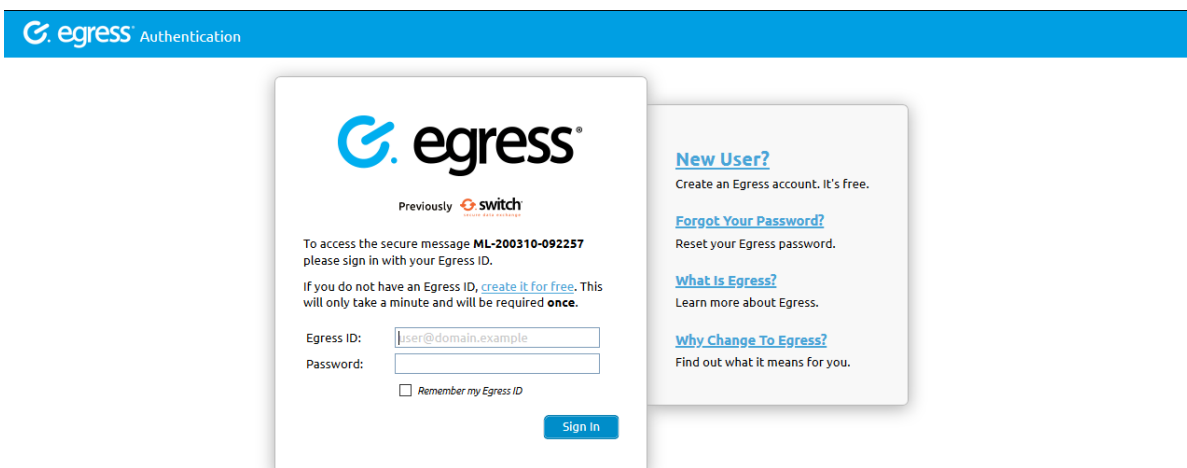
- You will be prompted to open the secure email.



- You will be prompted to login with your Egress ID

If the email address is not registered, you will be required to register and validate the address.

- Click New User



- Complete the form

Sign Up

1 To sign up for a free user account, please complete each part below:

Email (Egress ID):*

First name:*

Last name:*

Phone number: +44 55 5555 5555
We will not contact you unless you forget your password and security questions
 Email me about product updates and services from Egress

2 Choose a strong password to protect your identity:

Password:*

Confirm password:*

Minimum 8 characters, with at least 1 lower case and either 1 upper case / number

Question #1:

Answer #1:*

Question #2:

Answer #2:*

3 To complete the sign up process please enter the security code shown below:

Security code:*

2FE163
The code contains 6 characters and may contain digits and letters A-F

We'll store the information you give us in accordance with [Privacy Statement](#). Please read it before clicking "Create Account" below.

If the email address you use is owned or controlled by an organisation (like your employer) we may share the existence of your account registration with them.

I accept the [free user terms](#) and have read the [Privacy Statement](#)

[Create Account](#)

The Service

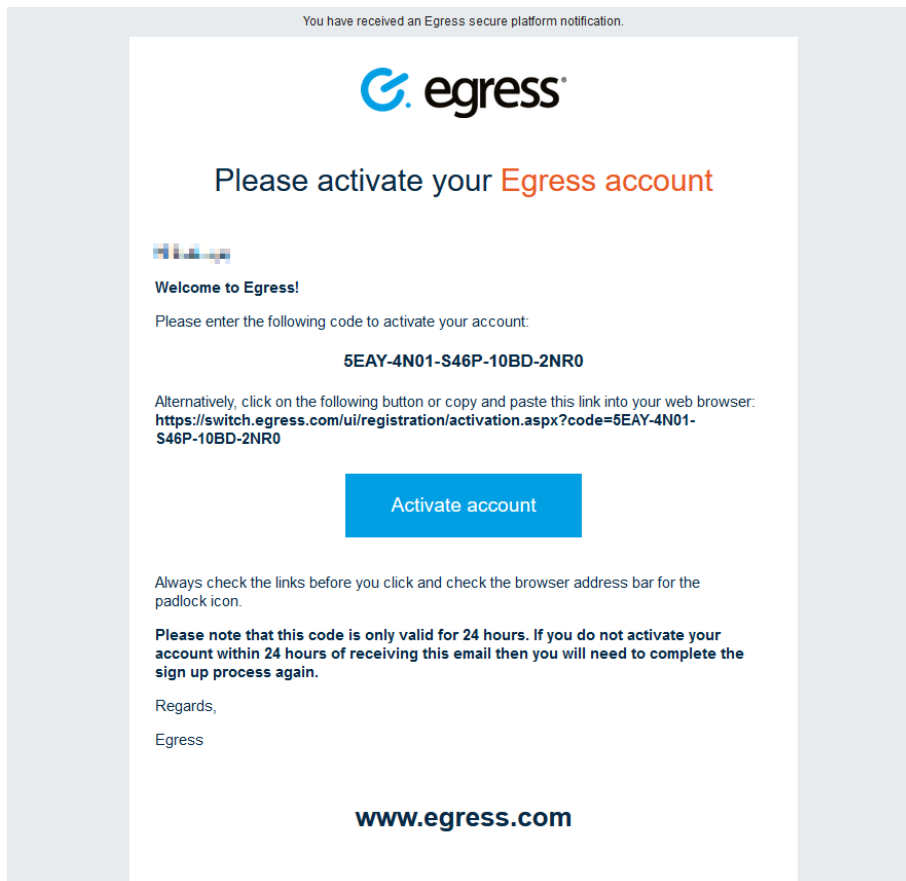
Egress products and services enable millions of users (both paying and free) to protect the sensitive data they need to share. For more information on our customers, visit [case studies](#).

Service Benefits

- Your Switch ID/Egress ID is a secure identity. This allows you to read and reply to encrypted emails as well as access large files that have been sent to you securely.
- Free users can send and reply to paying subscribers an unlimited amount, totally free of charge.
- Free users are automatically provided with 25 credits to communicate with non-registered users.
- Enhance the service experience by downloading our desktop, Outlook and mobile apps, totally free of charge: <https://www.egress.com/downloads>
- Track in real-time when your secure emails or files are opened.
- Revoke access to a sent email or file in real-time.

You will receive an email to validate your address.

- Click the Activate Account link



- Enter the Activation code provided in the email.

The screenshot shows the Egress Registration page. At the top, there is a blue header with the Egress logo and the word "Registration" on the left, and a "Sign in to Egress" link on the right. The main content area is divided into two columns. The left column is titled "Almost done" and contains the following text: "A new Egress account with Egress ID [redacted] has been created but is not active yet. A message with an activation code was sent to your address." "To activate your Egress account please click on the link contained in the email, or copy the activation code into the box below." "Note: if you don't get the email within 3-5 minutes, please verify that the email address **matt_lye@hotmail.com** was typed correctly and check your Spam folder." "If the address was entered incorrectly, return to the previous page and register again." Below this text is a text input field labeled "Activation code:" containing the code "5EAY-4N01-546P-10BD-2NR0". A blue button labeled "Submit Activation Code" is positioned below the input field. The right column is titled "Next steps" and contains the following text: "Mobile and Web Access" (a link), "You can access your messages at anytime using Web Access." "Learn more about Egress secure platform" (a link), and "Take a quick tour and learn how to access secure messages."

You will be able to view the email and any further emails by opening the secure email and logging in with your Egress ID.

Full details on how to use the Encryption service are available on the NHS Net support website - <https://support.nhs.net/article-categories/encryption/>

5. PROCESSES THAT DELIVER EMAIL

The table below lists the following processes which will result in an email being generated.

Where the Employing Authority is SPINE enabled and the action taken in the email would update a data item that triggers the SPINE Interface then the outbound FYA email will be sent but it will not contain any Action buttons. The user will need to login to ESR using an NHS CRS Smartcard to take the required action.

5.1. FYI AND FYA PROCESSES

Process	Employee	Manager	Role Holder
Absence Trigger Points	N/A	Notification sent to manager when the Return to Work Discussion flag against an employee absence record has been left blank or absence end date has not been entered.	N/A
Absence Timeout	Notification sent to initiator after 28 days when no action taken against a request for Annual Leave.		
Applicant Details	N/A	N/A	Notification sent to Applicant Details Role Holder when an applicant makes a change to their personal details.
Appraisals	Notifications sent for interaction with appraisal e.g. appraisal transferred to employee by appraiser.	Notifications sent for interaction with appraisal e.g. appraisal transferred to appraiser by appraisee.	N/A
Approve Learning Enrolment	N/A	Notification sent when an employee enrolls on a shared class.	Notification sent to a Shared Training Centre (STC) Learning Administrator Role Holder to approve an enrolment on a class from an employee who is in a STC customer organisation.
Assessment Submission	Notification sent to an employee following the successful completion of a test associated with a course.	Notification sent to manager when an employee has successfully completed a test.	N/A

Process	Employee	Manager	Role Holder
Auto User Notification	N/A	N/A	Notification sent to the Auto User Account Details Role Holder to advise of user account details created as part of the Auto User Create Process.
Bank Assignment Set to Inactive Not Worked	N/A	N/A	FYI notification sent to NHS CRS RA Agents Role Holders to advise of Bank staff that have not been paid for 17 consecutive weeks (4 consecutive months) and as a result their Assignment status has been updated to "Inactive Not Worked".
Cancel Learning Enrolment	Notification sent to an employee when a class they are enrolled on is cancelled.	Notification sent when the class that an employee is enrolled on is cancelled.	N/A
Capability Review Notification	Notification sent to the person who is recorded as the HR Contact against the capability record when an employee's capability review date is today's date + 18 days and today's date + 10 days.	Notification sent when an employee's capability review date is today's date + 18 days and today's date + 10 days.	
Certification Notifications	<p>Notifications sent to an employee</p> <ul style="list-style-type: none"> • When they have been subscribed to a learning certification. • Following the successful completion of a learning certification. • When a learning certification they were subscribed to has expired. • When a learning certification they are subscribed to needs to be completed by today +1 day. • When a learning certification they are subscribed on is available for renewal. 	N/A	N/A

Process	Employee	Manager	Role Holder
	<ul style="list-style-type: none"> When they unsubscribe from a learning certification. 		
Change Hours	N/A	Notification sent to the manager where approval is required for a change in hours made to an employee by an administrator in self service.	
Change Location	N/A	Notification sent to the manager where approval is required for a change in location made to an employee by an administrator in self service..	N/A
Change Supervisor	N/A	Notification sent when a supervisor has new staff assigned to them	N/A
Change to Assignment EIT	N/A	Notification sent to the manager where approval is required for a change to an assignment made to an employee by an administrator in self service.	N/A
Competence Update	Notification sent to employee to advise request to update competence record following learning has been forwarded for manager approval.	N/A	N/A
Competence Update (Approval Required)	Notification sent to the employee when a manager has approved the update to their competence record following their completion of learning.	Notification sent to manager when an employee has completed learning and the manager is required to give approval before the employee's competence record is updated.	N/A
Competence Update (No Approval Required)	Notification sent to the employee when their competence record is updated following their completion of learning.	Notification sent to manager when the competence record of their employee has been updated.	N/A
Competence Update (No Update)	Notification sent to employee advising their competency profile is eligible for update following their completion of learning.	Notification sent to manager when the competence record of their employee is eligible for updated.	N/A

Process	Employee	Manager	Role Holder
Competence Update (Rejection)	Notification sent to the employee when a manager has rejected the update to their competence record following their completion of learning.	N/A	N/A
Competency Expiry Notification	Notification sent to employee when their competence is due to expire in 4 months, 1 month and short notice.	Notification sent to manager to advise they have an employee who has a competence that is due to expire within 1 month.	FYI Notification sent to the Expiry Notification Role Holder to advise of employees with competencies due to expire within 1 month.
Course Evaluation Notification	Notification sent when an employee has successfully attended a class that has an evaluation associated with it inviting them to complete the on line evaluation.	N/A	N/A
Conflict of Interest Notification	Notification sent to an employee when the NHS Decision Maker notification process is run.		Notification sent to Conflict of Interest Reviewer Role Holders on a monthly basis outlining new or updated declarations made in the previous month.
DBS Reminder Process	Notification sent to an employee when the subscription to the DBS Update Service is due to expire within the next 30 days.	N/A	N/A
Employment Checklist Notifications	N/A	N/A	Notification sent to Employment Checklist Role Holders to advise of employees occupational health records that have been updated.
Error Action Notification	N/A	Notification sent to a person when a transaction (e.g. approval) has failed because the record is locked by another user.	N/A
External Learning	Notification sent to an employee when they submit a request to add external learning to their record.	Notification sent to manager when an employee submits a request to add external learning to their record.	N/A
Fixed Term Contract Expiry Notification	N/A	Notification sent when an employee's fixed term contract end date expires in 4 months, 1 month and short notice.	Notification sent to Expiry Notification Role Holders when an employee's fixed term contract end date expires in 4 months, 1 month and short notice.

Process	Employee	Manager	Role Holder
Flexible Working	Notifications sent for confirmation of submission of request and ending of flexible working arrangements.	Notifications sent when Decision Date not entered, when a request is withdrawn and ending of flexible working arrangements.	Notification sent to Role Holder where the Agreed Arrangements End Date has been populated.
Generic Attendance Notification	N/A	N/A	The Role Holder will receive a notification to advise of successful receipt of the NHS Generic Attendance File.
IAT Update Competence	N/A	N/A	Notification sent to Stat & Mand Competencies Ntf role holder to action competences transferred at the pre hire stage.
Internet Access Approval	N/A	Notification sent when an employee requests remote access to Employee Self Service, Employee Self Service (Limited Access).	Notification sent to Internet Access Approval Role Holder when an employee requests remote access to Employee Self Service, Employee Self Service (Limited Access).
Learner Enrolment Status Change	Notification sent when enrolment to a class the employee is waitlisted to attend is confirmed.	N/A	N/A
Learning Path Notifications	<p>Notifications sent</p> <ul style="list-style-type: none"> • Following the successful completion of a learning path • Reminder notification sent when the employee is subscribed to a learning path which needs to be completed by + 1 day of the learning path creation date • Notification sent when the an employee has been subscribed to a learning path • Notification sent when an employee has been unsubscribed from a learning path 	<ul style="list-style-type: none"> • FYI notification sent when an employee has successfully completed a learning path • Notification sent when the manager has created a learning path that their employee then successfully completes 	N/A

Process	Employee	Manager	Role Holder
New Starter Notification	N/A	N/A	Notification sent to role holders / external users to advise of new starters with a start date in the next 14 days.
NHS Diary Reminder Process	N/A	N/A	Notification sent to Person reminder or Assignment reminder Role Holders when the diary reminder has a review date of today or has a due date which is 30 days from today's date.
NHS Employee Relations	N/A	N/A	Notification sent to the Employee Relations Role Holder when the 'Warning Expiry Date' field for any of the Employee Relations processes is completed.
NHS Reset Internet Password	Notification sent to the employee to advise that their internet password has been reset.	N/A	N/A
NMC Revalidation Notifications	Notification sent when an employee's NMC Revalidation needs to be renewed in the next 12 months.	Notification sent when an employee's NMC Revalidation needs to be renewed in the next 12 months.	Notification sent to NMC Revalidation Role Holder when employees need to review their revalidation within the next 12 months.
OLM Class Notify	Notification sent to all selected class enrolments using the Notify functionality available on the Manage Classes form.	N/A	N/A
OLM Instructor Notifications	If the person is recorded as the instructor of an OLM course, notifications will be sent when a booking for them is confirmed, cancelled or rescheduled or if the location of the class changes.	N/A	N/A
OLM Manual Waitlist	Notification sent to the person who is the Class Administrator when a place becomes available on a class but the system cannot automatically enrol a waitlisted learner as the start of the class is within 7 days.	N/A	N/A

Process	Employee	Manager	Role Holder
Pay Progression	Notification sent to an employee to remind them of an upcoming pay step progression point.	Notification sent to a manager when they have staff with an upcoming pay step progression point within the next 90 days.	Notification sent to a role holder when employees have an upcoming pay step progression point within the next 45 days.
Professional Bodies Notifications - Decision	N/A	N/A	Notification sent to role holders when there are lines on the Professional Bodies Interface which require a decision on being accepted.
Professional Bodies Notifications - Failed	N/A	N/A	Notification sent to role holders when there are failed lines on the Professional Bodies Interface.
Professional Bodies Notifications - Success	N/A	N/A	Notification sent to role holders when the Professional Bodies Interface has successfully updated lines.
Property Register	N/A	Notification sent to manager one week before the employee is due to leave and again on the actual termination date/last working day and they still have property assigned.	Notification sent to Property Register Role Holders 1 week before an employee is due to leave and they still have property assigned to them.
Proxy Notification	Notification sent to a person who has been granted proxy access.	N/A	N/A
Qualifications	N/A	Notification sent when an employee has requested an addition or change to their recorded qualifications.	N/A
Registration Expiry Notification	Notification sent to employee when their registration is due to expire at today's date + 120 days and today's date + 30 days.	Notification sent to manager when their employees registration is due to expire at today's date + 120 days and today's date + 30 days.	Notification sent to role holders when an employee registration is due to expire at today's date + 120 days and today's date + 30 days.
Returning Employee (Maternity)	N/A	Notification sent when an employee is due to return to work following maternity leave in 21 days from the system date.	N/A
Reverse Termination Notification	N/A	N/A	Notification sent to the role holder when an employee's termination is reversed



Process	Employee	Manager	Role Holder
Review Due Notification	Notification sent to an employee when their development review due date is within 1 month.	Notification sent when an employee's development review date is due within 1 month.	Notification sent to Expiry Notifications Role Holder when employee's have a development review date which is due within 1 month.
Self Service Generic Approval	Notification sent to employee when absence or competence is approved.	Notification sent to manager/administrator when an absence or competence has been added to an employee record and is subsequently approved.	N/A
Shared Training Centre	Notification sent to an employee to advise that a competence has been awarded following the successful completion of a course provided by a Shared Training Centre.	Notification sent to a manager to advise their employee has been awarded a competence following successful completion of a course provided by Shared Training Centre.	N/A
Staff Acceptance Notification	N/A	Notification sent to the manager when a new employee has been assigned to them e.g. they have been set as the supervisor against an employee's record.	N/A
Supervisor Assignment Status Change	N/A	N/A	Notification sent to Supervisor Hierarchy Notification Role Holders to advise of a change to a supervisors assignment status.
Termination Notification	N/A	N/A	Notification sent to role holders to advise of employees leaving within the next 14 days.
Work Permit Expiry Notification	Notification sent to employee when their work permit is due to expire at today's date + 90 days and today's date + 30 days.	Notification sent to manager when their employee has a work permit that is due to expire at today's date + 90 days and today's date + 30 days.	N/A

5.2. FORGOTTEN USERNAME OR PASSWORD

When a user requests their username or password, they will receive an email for each user account associated with an email address. If they supply a username they will receive an email for that specific user account.

The name of the employing authority is included in the email.

FYI: ESR Login Details

 DELETE  REPLY  REPLY ALL  FORWARD 



PRODUCTION WORKFLOW, Esr (ELECTRONIC STAFF RECORD)

Mark as unread

Thu 28/02/2019 08:49

To: USER, A (ELECTRONIC STAFF RECORD)

The following user account is associated with your email address

Organisation: 123 Electronic Staff Record
User Name: 123AUSER01

You can now login
<https://my.esr.nhs.uk>

or reset your password
<https://my.esr.nhs.uk/usersselfservicereset?params=fldafflaifqghhhss>

This email can be ignored if you did not submit the user name lookup request
The password reset link is only active for 4 hours.






5.3. BANK ACCOUNT CHANGES

An email will be sent to an employee when any change is made to the bank account details held on their record. A change is defined as an addition, update or deletion of details.

Multiple changes within 5 minutes will only generate one email

No workflow notification is generated for the changes, this is an email only notification.

Bank Account Details

 DELETE  REPLY  REPLY ALL  FORWARD 



PRODUCTION WORKFLOW, ESR (ELECTRONIC STAFF RECORD)

Thu 28/02/2019 08:49

Mark as unread

To: SMITH, Ben (ESR HOSPITAL)

This is an automated alert email from the NHS Electronic Staff Record (ESR) system.

Your Bank Account details have been added or changed for your ESR record in 123 ESR Hospital for assignment 12345678.

This may be because you have just started employment, had a new Job (Assignment) created or used a bank account switching service.

If you did not make the amendment or authorise them to be entered on your behalf, then please login to ESR Self Service and check that the details are correct <https://my.esr.nhs.uk/>.


If you do not have access to ESR Self Service please contact your usual Payroll team to confirm your Bank Account details are correct.

Please DO NOT reply to this automated email as it will not be received.

5.4. PAYSリップ AVAILABILITY

Employees can opt into an email notification which will alert them when their payslip is available to view in the My Payslip and P60 Portlet. It is sent to all email address types and can be turned on and off as the employee wishes.

ESR Payslip Now Available

 PROD Workflow Mailer <esr.wfmPROD@nhs.net>
Mon 1/17/2022 00:33
To: Harrison, Ann (NHS HOSPITAL)

Dear Ann

Your latest ESR Payslip from NHS Hospital for assignment number ending xxxxx123 is now available. To view and download, login to your ESR account.

If you are due to leave NHS Hospital please remember that you will need to download any previous payslips or P60s before you leave as you will not be able to do this once you have left.

If you have recently left NHS Hospital and are unable to login to ESR you will need to contact the Organisations Payroll or Human Resource Department to find out how to gain access to this payslip.

Thank you.

[Reply](#) | [Forward](#)

5.5. EMPLOYEE EXIT QUESTIONNAIRE

Employees with a termination date entered at employee or assignment level are sent an email prompting them to login to ESR and complete their exit questionnaire.

Exit Questionnaire



PRODUCTION WORKFLOW, ESR (NHS ELECTRONIC STAFF RECORD)

Thu 9/17/2020 15:51

To: Perkins, Richard



Your employing organisation has indicated that you are leaving and as such would like to understand more about your experience whilst working for the organisation. We are asking you to complete a short exit questionnaire to gather information that will help to improve the working lives of staff in the NHS and to provide better care for patients.

Your organisation will be able to use the results of the survey to improve local working conditions and practices and to increase involvement and engagement with staff. Other organisations, including NHS England and NHS Improvement or NHS Wales for those employed in Wales, will make use of the non-identifiable and nationally aggregated results.

To complete the questionnaire please check your ESR Worklist Notifications.

Please read each question carefully, but give your immediate response by selecting the answer which best matches your personal view.

If you have any queries about this questionnaire, or would like to undertake a face to face interview, please contact the HR/People department in your organisation.

5.6. ESR LEARNING EMAIL NOTIFICATIONS

Emails are generated for learners by the events specified below. This is different to the processes specified in section 5.1 above.

Email Name	Trigger(s)
Joining Instructions	New enrolment with status 'Confirmed' or current enrolment with status updated to 'Confirmed'.
Update of Class	Update of any of the following items against a class: Time, Date, Venue (this is held as a Resource).
Cancellation of Class	Enrolment status is updated to 'Course Cancelled'.
Withdrawal from a Class	Enrolment status is updated to 'Withdrawn'.

Notes:

- 1) Emails will only be triggered where a 'Class Start Date' is a future date.
- 2) All emails are triggered irrespective of the source of the change. For example: if a user withdraws themselves from a class, they will receive the 'Withdrawal from a class' email, as they would if a learning administrator had withdrawn them.
- 3) Emails will only be generated for classroom based learning. i.e. classes that are part of an offering with one of the following delivery modes: Classroom, Conference, Course, Instructor-Led, Local Delivery, Seminar
- 4) All emails are triggered instantly (i.e. there is no overnight process. As soon as one of the above triggers is activated, the email is sent).
- 5) The email text cannot be locally amended. The Joining Instruction email can include 3 additional paragraphs using three free text fields stored on the Offering detail.
- 6) Administrators are not able to locally 'switch off' the automatic emails, however they can be prevented by not entering (or removing) an email address against the enrolment.
- 7) The email address used to send an email to a learner is the email address held against the enrolment. By default, this is populated by the email address held against the 'Office Details' tab on the person record, however this can be amended by the learning administrator should the email need to be directed elsewhere.
- 8) Emails will be generated for customer contacts, where an email address is entered against the enrolment (this does not automatically pull through from the customer contact email address and will need to be entered at the time of enrolment).

The table below outlines the fields that are used in ESR Learning email notifications:

Field	Comments
Course Title	Name of the Course
Class Start/End Times/Dates	Dates/Times as detailed against the Class
Venue Name	Primary Venue Resource name booked against the Class
Location Address Details	Address of the location set against the primary venue resource.
Free Text Field 1, 2 & 3	Free text fields (150 characters each) held in the Offering detail.
Training Centre	Training Centre Organization name (with VPD removed), taken from the Class.
Location Phone Number	Phone number of the location set against the Primary Venue.

The information held in the OLM emails is detailed below:

5.6.1. Joining Instructions

Subject: <Course Title>, running from <Class Start Date> until <Class End Date>

We are pleased to confirm a place has been reserved for you as above.

Details of the course are provided below:

Start time: <Class Start Time>

End time: <Class End Time>

Venue: <Venue Name>

Location: <Location Address> <Location Line 1>, <Location Line 2>, <Location Line 3>, <Location Town>, <Location County>, <Location Post Code>.

<Free Text field 1>

<Free Text field 2>

<Free Text field 3>

Please let us know of any support or disabilities you may need/have which you would like to make us aware of. If you would like to discuss this please contact us on the details provided.

If for any reason you are unable to attend please contact the department as soon as possible so that the place can be offered to delegates on the waiting list.

Yours sincerely

Course Administrator

For further details contact

<Training Centre>

<Location Phone number>

Please do not reply to this email

5.6.2. Update of Class Details

Subject: UPDATE: <Course Title>, <Class Start Date> - <Class End Date>

This email is a reminder of your training enrolment for the above course; please review the Course details as these may have changed.

The course will take place from <Class Start Time> until <Class End Time> in <Venue Name>, <Location Address> <Location Line 1>, <Location Line 2>, <Location Line 3>, <Location Town>, <Location County>, <Location Post Code>.

If for any reason you are unable to attend please contact the department as soon as possible so that the place can be offered to delegates on the waiting list.

Should you have any special requirements, please let us know, and we will do our utmost to ensure that these are met.

Yours sincerely

Course Administrator

For further details contact

<Training Centre>

<Location Phone number>

Please do not reply to this email

5.6.3. Cancellation of Class

Subject: CANCELLATION: <Course Title> [<Class Start Date> - <Class End Date>]

Unfortunately it has been necessary to cancel the above class. We apologise for any inconvenience caused.

Yours sincerely

Course Administrator

For further details contact

<Training Centre>

<Location Phone number>

Please do not reply to this email

5.6.4. Withdrawal from a Class

Subject: Enrolment cancelled: <Course Title> [<Class Start Date> - <Class End Date>]

Our records indicate your place on the above course has been cancelled. If you believe this is in error please contact your manager or the training department.

Yours sincerely

Course Administrator

For further details contact

<Training Centre>

<Location Phone number>

Please do not reply to this email

5.7. ESR BI ALERTING

Local BI Administrators can create BI Agents which can deliver limited parts of analyses or dashboard pages to the ESR BI Homepage/Dashboard and to an email address.

Local BI Administrators can create BI Agents for both local and national analyses/dashboards.

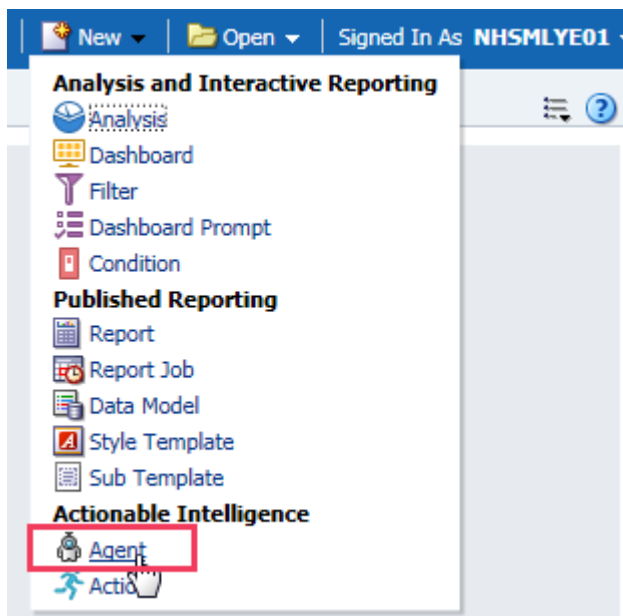
BI Agents can run to a defined schedule and can be delivered to a list of recipients or can be set up to allow subscribers. A recipient or subscriber can be any BI User within the Organisation of the Local BI Administrator who created the BI Agent.

A BI Agent can also provide an alert if it meets certain conditions. As an example, you may setup an alert to notify managers when their absence rate reaches above 10%.

NOTE: BI Agents are intended for alerting and other conditional reporting, and not for large data extracts therefore the maximum number of rows a BI Agent can deliver is limited to 75.

5.7.1. Creating BI Agents

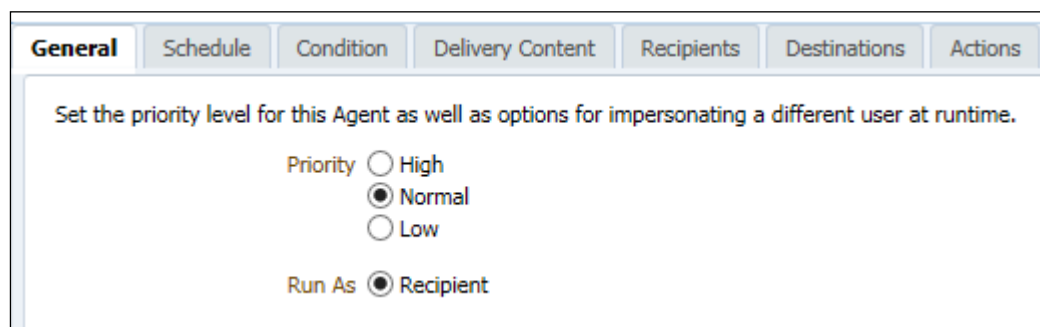
A BI Agent can be created from the New menu



The settings for the agent are defined on the following tabs:

General Tab

A **Priority** can be defined for the Agent as High, Normal (Default) and Low.

A screenshot of the 'General' tab in the ESR BI system. The tab is selected, and the settings for the Agent are displayed. The 'Priority' is set to 'Normal' and 'Run As' is set to 'Recipient'. The text above the radio buttons reads: 'Set the priority level for this Agent as well as options for impersonating a different user at runtime.'

Schedule Tab

You can specify a schedule that the Agent will run with, the options are:

- Once
- Daily
- Weekly
- Monthly

The screenshot shows the 'Schedule' tab in a configuration window. The title is 'When do you want the Agent to be scheduled to run?'. The 'Enabled' checkbox is checked. The 'Frequency' is set to 'Weekly' with a dropdown arrow, and 'Every' is set to '1' with a spinner, followed by 'Weeks'. Below this, there are checkboxes for each day of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday, all of which are currently unchecked. The 'Start' field contains the date and time '16/04/2018 10:00:00' and has a 'Default' button next to it. At the bottom, the 'End' section has two radio buttons: 'No end date' (which is selected) and 'Select end date'.

Condition Tab

You can add a condition to the Agent that will be evaluated and used to decide whether content is delivered to a recipient:

For example:

The screenshot shows a 'Create Condition' dialog box. The title is 'Create Condition' with a help icon and a close button. The instruction reads: 'Select the data that the Condition will be based on and define how the Condition will evaluate to "True".' There are three main sections: 1. 'Create condition based on' with a dropdown menu showing 'Analysis' and a 'Browse...' button. 2. 'Condition Data' with a file icon and a text field containing '/shared/NHS Standard Dashboards/NHS Absence Analysis Dash...'. 3. 'True If Row Count' with a dropdown menu showing 'is greater than' and a spinner set to '20'. At the bottom right, there are three buttons: 'Test', 'OK', and 'Cancel'.

Conditions can also be used to generate a list of recipients in an Application Role (URP). See guidance provided later in this section.

NOTE: an Agent can only contain one condition.

Delivery Content Tab

The delivery formats provided are HTML, PDF, Excel, CSV and text. Results can be delivered directly to the BI Homepage or as an email attachment

The screenshot shows the 'Delivery Content' configuration tab. It includes the following fields and options:

- Subject:** Monthly Update
- Content:** Dashboard Page (dropdown), with buttons for 'Browse...', 'Customize...', and 'Clear'. Below this is the path: /shared/888/_portal/Staff Movements Dashboard/Staff Movements
- Entire Dashboard:**
- Format:** PDF (dropdown)
- Delivery:** Deliver results directly, Deliver as attachment
- Attachment Note:** Please see attached monthly update (text area with scroll arrows)
- If Condition is False:** Deliver this message (text area with scroll arrows)

Recipients Tab

A list of recipients can be created by selecting individual users or by using Application Roles. It is not possible to add email addresses as recipients:

The screenshot shows the 'Recipients' configuration tab. It includes the following sections and options:

- Direct Agent Recipients:** Specify who will receive this Agent.
- Select Recipients:** Show All (dropdown), with '+', 'Add', and 'X' icons. Below is a table with a 'Name' header and several empty rows.
- Use Analysis:** Get Recipients from the Analysis Used in the Agent Condition
- Publish for Subscription:** Enable this Agent to be published and determine which users can subscribe to this Agent. Publish Agent for subscription

When an Agent runs it runs for the individual user (recipient). The Agent content delivered will therefore be relative to the user's access to ESR. For example an Agent delivered to a BI Administrator would contain information for the Employing Authority whereas the same Agent delivered to Manager would only contain information for their supervisor hierarchy. If a user has more than one URP the Agent will run based on the most permissive URP allocated to the user.

The 'Get Recipients from the Analysis Used in the Agent Condition' checkbox is used to generate a list of recipients in an Application Role (URP). See guidance provided later in this section. The Publish for Subscription region enables you to create an Agent to which users can subscribe:

Publish for Subscription
Enable this Agent to be published and determine which users can subscribe to this Agent.

Publish Agent for subscription

Agent Subscribers
Show All All + X Unsubscribe

Name	Currently Subscribed
Authenticated User	

Ticking the 'Publish Agent for subscription' checkbox enables you to define who can subscribe to the Agent. The default is 'Authenticated User' which allows any user within your Employing Authority to subscribe. Alternatively you can refine this by User or Application Role:

Publish for Subscription
Enable this Agent to be published and determine which users can subscribe to this Agent.

Publish Agent for subscription

Agent Subscribers
Show All All + X Unsubscribe

- All
- Users
- Catalog Groups & Application Roles

Name	Currently Subscribed
Authenticated User	

Destinations Tab

The following options are available:

Home Page and Dashboard – select this option to deliver the Agent to the ESR BI homepage

Devices – select this option to deliver the Agent to an email address

General | Schedule | Condition | Delivery Content | Recipients | **Destinations** | Actions

Specify where this Agent will be delivered.

User Destinations Home Page and Dashboard
 Devices
 Active Delivery Profile





NOTE: ESR BI will use the email address stored against the recipients person record.

Actions Tab

Users can select actions that are available to be executed (either created by themselves, or National actions created by the NHS Central Team).





Specify any actions to invoke when the Agent completes.

Agent Condition True or No Condition Exists

Actions    

Name	Invoke per Row

Agent Condition is False

Actions    

Name	Invoke per Row

Actions can also be used to run one (or more) 'child' Agents, within the context of the current Agent. This is useful to:

- Generate a list of recipients in an Application Role (URP) in the current Agent and then;
- Run the 'chained' Agent which can contain business related conditions in context of each recipient.

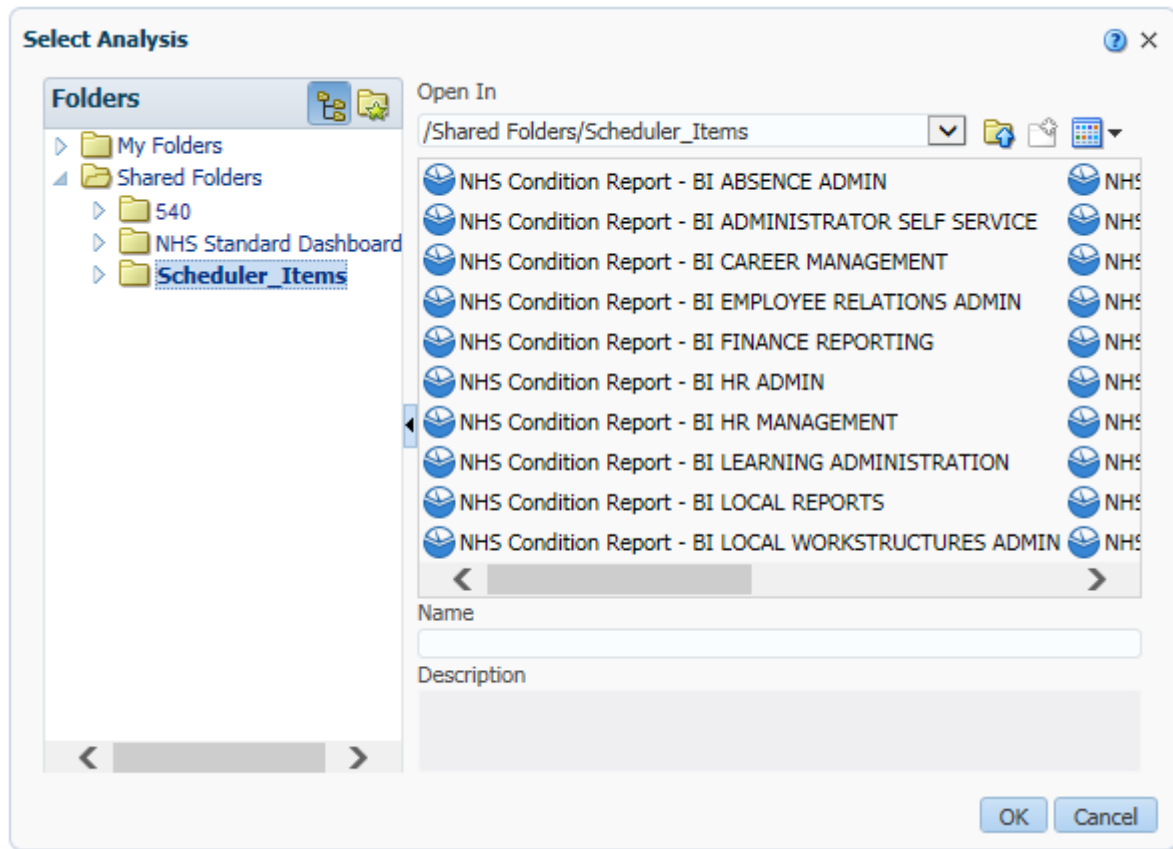
Generate a list of recipients in an Application Role (URP)

When defining a list of recipients of an Agent, only Users can be selected from the Recipients tab. To generate a list of recipients in an Application Role (URP) a condition must be created as follows:

Condition Tab

Create a new condition and browse to the following location:

Shared Folders - Scheduler_Items



A list of Analyses corresponding to the available Application Roles will be available within the folder. Select the required Analysis, for example NHS Condition Report - BI Manager Self Service if you wish to deliver an Agent to all users of the Manager Self Service URP.

The 'True If Row Count' field will default to 'is greater than 0' – this should not be amended.

Click the OK button to create the condition.



Recipients Tab

Tick the 'Get Recipients from the Analysis Used in the Agent Condition' checkbox.

In the Settings region, select 'Logon' from the Column Containing Recipients dropdown list.

Use Analysis

Get Recipients from the Analysis Used in the Agent Condition

Analysis NHS Condition Report - BI MANAGER SELF SERVICE

Settings

Column Containing Recipients Logon

2nd Column Containing Recipients (optional) (none)

Only Return Rows Relevant to the User Running the Agent

All other tabs within the Agent should be completed as described earlier in the section. The Agent will now run for all users of the Application Role (URP) selected.

REMEMBER: Users can also be specified as the recipient of an Agent. Any Users specified in the 'Direct Agent Recipients' area of the Recipients tab will receive the Agent in addition to the users of the Application Role (URP) selected.

Deliver a conditional Agent to a list of recipients in an Application Role (URP)

A condition can be added to an Agent that will be evaluated and used to decide whether content is delivered to a recipient e.g. based on certain KPI's.

As an Agent can only contain one condition, the following steps should be taken to deliver a conditional Agent to a list of recipients in an Application Role (URP).

STEP 1 – create the conditional Agent (chained Agent)

Create an Agent containing the applicable condition (KPI) e.g. the absence rate is greater than 10%.

Ensure the frequency on the Schedule tab is set to 'Never'.

General **Schedule** Condition Delivery Content Recipients Destinations Actions

When do you want the Agent to be scheduled to run?

Enabled


Frequency Never

Start 28/09/2017 09:10:00 AM Default

Re-run Agent Every 1 Minutes

Until 11:59:00 PM Default

Remove yourself as the recipient on the Recipients tab.

(highlight your username in the row and click the  icon.

We are not going to use this Agent to determine a list of recipients.

General | Schedule | Condition | Delivery Content | **Recipients** | Destinations | Actions

Direct Agent Recipients
Specify who will receive this Agent.

Select Recipients
Show All [v] + [i] [x]

Name

Use Analysis
 Get Recipients from the Analysis Used in the Agent Condition Analysis

On the Destinations tab, deselect all checkboxes:

General | Schedule | Condition | Delivery Content | Recipients | **Destinations** | Actions

Specify where this Agent will be delivered.


User Destinations Home Page and Dashboard
 Devices
 Active Delivery Profile

Save the Agent in the desired location.

STEP 2 – create an Agent to generate a list of recipients in an Application Role (URP)

Using the steps described earlier, you should now create a second Agent to generate a list of recipients in an Application Role (URP).

Within this Agent click on the Actions tab and complete as follows:

Click on the Add New Action  icon and select 'Invoke Agent' from the list:






General | Schedule | Condition | Delivery Content | Recipients | Destinations | **Actions**

Specify any actions to invoke when the Agent completes.

Agent Condition True or No Condition Exists

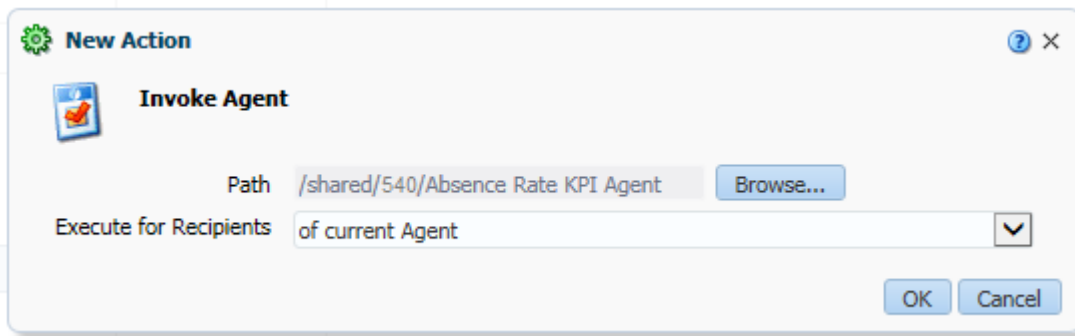
Actions

Name	Invo

-  Invoke a Web Service
-  Invoke a Java Method
-  Invoke Server Script
-  Invoke an HTTP Request
-  **Invoke Agent**

Click on Browse and select the conditional Agent (chained Agent) created in Step 1.

Click the dropdown list in the Execute for recipients field and select 'of current Agent'.



Click the OK button and save the Agent.

This Agent will now run the conditional Agent, as per the action defined on the Actions tab and deliver the conditional Agent to the list of recipients in the Application Role, as defined on the Condition tab.