

# Electronic Staff Record

## Recording Property Management on ESR

The ESR Property Register functionality enables organisations to record and track all items allocated to an employee such as, FFP3 Face Mask devices, lease cars, laptops, mobile devices, staff uniforms etc., which have a significant financial impact on the organisation if not returned by employees when they leave.

ESR enables the organisation to delegate this task as required;

- Central control via the HR responsibility
- Local control e.g. IT via a dedicated property register responsibility
- Controlled directly via managers or supervisors using self service
- Notifications and Reporting.



The Property Register can be accessed via the following User Responsibility Profiles (URPs);

- Property Management
- Administrator, Supervisor and Manager Self Service
- HR Administration.

A mix or all of these can be used so that property allocated by various departments is captured, therefore avoiding omissions. For instance the IT team may only allocate mobile devices and laptops, Facilities may record uniforms and PPE. HR might only allocate ID badges and the manager may record lease cars etc.

When an employee has property entered against their record on ESR, they can view the Property Register in read only mode via Employee Self Service and Employee Self Service (Limited Access) URPs. Employees are not able to add, update or amend their own property. Any changes would need to be made by their line manager/supervisor or those with the HR or Property Management URP access.

The screenshot shows the NHS Property Register interface for an employee named 'Scott, Mrs. Marie Rita B' with Employee Number '23580424'. The interface includes a table with the following data:

Item Name	Asset Number	Start Date	End Date	Status
<input checked="" type="radio"/> Portable Computer	036432	01-Sep-2015		
<input type="radio"/> Portable Computer	L039069	01-Jan-2013		
<input type="radio"/> Mobile Phone	Nokia C2	01-Jan-2013		

- When the user has access to HR URP property searches can be performed via Folders under the Special Information
- A 'Leavers with Property' notification is sent to the Property Register role holder a week before the employee's actual leaving date.

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### Benefits

- ✓ Employees can see what property or equipment is registered against their record and ensure it is returned upon leaving the organisation or changing roles.
- ✓ All property registration entrants are reportable and auditable further improving the reliability of the organisation's property records.
- ✓ Provides the organisation with the ability to track and trace the property and equipment issued to employees as well as the date upon return of the equipment or property.
- ✓ Enables the NHS to monitor the use of particular national items e.g. FFP3 Face Masks, make & model of particular brands etc.
- ✓ Organisations can understand and review the distribution of particular equipment to its employees and make informed decisions on the use and procurement of such equipment.
- ✓ As part of the Leavers process, the Property Register can serve as a reminder at termination, of what equipment is held by an employee and needs to be returned to the organisation in good time, avoiding unnecessary replacement costs.
- ✓ The capability is flexible and easy to use by both managers and multiple departments.



### How to record an issued or returned item in the Property Register

NHS ESR  
 XXX Property Management  
 (N) Property Register  
 Enter Property Register

x Enter Property Register Special Information(Smith, Mr. Ben)

Start Date	End Date	Detail	
23-AUG-2016	...		[ ]

A national list of items is automatically provided. However, organisations can also add their local items for use. The Asset Number field is an optional free text field which is also reportable.

It is recommended best practice that locally added items should be prefixed with the organisation's VPD number.

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During the SSHR termination process if the employee being terminated has any property assigned to them (i.e. in the property register) this will be displayed to the person performing this function.

Additionally, the following people will also be notified that there is property assigned to the person being terminated;

- The employee's recorded line manager will receive a notification one week (7 Days) before the termination date/last working day and again on the actual termination date/last working day.
- Holders of the "Property Register" role will receive a "Leavers with Property" notification one week before the employees leave. The notification will contain details of the employee e.g. where they work, their email address, their manager and email address as well as details of the property they have.

The FYI notification will remain open in each role holder's worklist until it is closed



An example of the notification is shown here:

Worklist >

Bradley05, Mr. Derek (20101327) has been terminated and has property assigned to them

**Information**  
This notification does not require a response.

OK Reassign Request Information

From: SYSADMIN  
To: Leese05, Vivian  
Sent: 07-Apr-2017 15:11:36  
ID: 324031

**Summary:**  
Bradley05, Mr. Derek (20101327) has been terminated and has property assigned to them.

**Supervisor Details:**  
Name:  
Employee Number:  
Email Address:

**Person Details:**  
Last Day of Working: 04-APR-2017  
Employee Email:

**Assignment Details:**  
Assignment Number:  
Organisation:  
Location:

**Property Details:**  
(Where the table below has no rows then all items have already been actioned)

Item	Asset Number	Start Date	End Date
Badge	08 1926	01-APR-2017	31-MAR-2018
Mobile Phone	07123 456789	01-APR-2017	31-MAR-2018
Portable Computer	23/962 Lenovo	01-APR-2017	31-MAR-2018

OK Reassign Request Information

Return to Worklist

### Adding local items to the List of Values in the Property Register.

Additional property items can be added to the list of values and this can be actioned via the following URPs;

Local HRMS Systems Administration or Local HRMS Systems and User Administration using the guidance which is found in the [ESR User Manual](#)

If you wish to stop the item being available in the Property Register, go back and add a date into the 'Enabled To' field.

Be aware that adding an End Date does not remove or End Date the item from existing employee records, it only prevents the item from being available to be chosen in the future.

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### Reporting and Auditing Property Register Items

Using ESR Business Intelligence, a number of reports can be run from the NHS Staff in Post Dashboard under the Property Register tab providing a range of information regarding the Property Register. The following analyses are available;

- **Property Register analysis** will show the number of Property Register entries grouped by Staff Group or organisation Levels 1-4.
- **Property Register Timeline analysis** shows the number of Property Register entries over a period of time (default previous 12 months).
- **Property Register Detail analysis** shows the detail of Property Register entries at an effective date (as defined by the user).

An Example BI Property Register Detail Report is shown below.

Group by Org L2 and Org L3 and and OK

Item Number	Assignment Number	Employee Email Address	Supervisor Name	Supervisor Email Address	Org L2	Org L3	Staff Group	Item Name	Asset Number
01234567-4		johnsmith@esr.nhs.net	Bloggs, Joe	bloggs.joe@esr.nhs.net	Org L2	Org L3	Add Prof Scientific and Technic	Item Name	Asset Number
01234567-4		johnsmith@esr.nhs.net	Bloggs, Joe	bloggs.joe@esr.nhs.net	Org L2	Org L3	Add Prof Scientific and Technic	Item Name	Asset Number
01234567-4		johnsmith@esr.nhs.net	Bloggs, Joe	bloggs.joe@esr.nhs.net	Org L2	Org L3	Administrative and Clerical	Item Name	Asset Number

### Further Information

Further information can be obtained from the links below:

- [ESR USER MANUAL](#)
- [BI Reporting- Property Register](#)

### Next steps?

Firstly, you need to contact your NHS ESR Functional Account Manager who can help advise on which of the options is most suitable for you to progress. Your NHS ESR Functional Account Manager details can be found on the ESR Hub. Details for your regional contacts can be found via the links below:-

- [London](#)
- [South of England](#)
- [Midlands and East of England](#)
- [North of England](#)
- [Wales.](#)



Interested in implementing the Property Register in ESR? Your NHS ESR Functional Account Manager can talk to you about how to do this.

Before you get started, why not access our helpful guides on our support sites by clicking [here](#).