

# Electronic Staff Record (ESR)

## Employee Self Service (ESS) User Guide

ESR Employee Self Service (ESS) allows you to amend and view information about your Electronic Staff Record. The functionality currently supported by the Trust is listed below and further guidance on how to navigate around your record can be found in this document.

By accessing your ESR Employee Self Service (ESS) record, you are able to:

**View your:**

- Payslips and P60s
- Total Reward Statements
- Absence calendar
- Registration information
- Announcements relating to ESR

**Amend your:**

- Home address details
- Telephone numbers
- Emergency contact details
- Bank account details
- Personal details e.g. sexual orientation; religious belief; disability information

# Contents

## **How to Access Employee Self Service (ESS)**

[Accessing ESS from a Trust Computer](#)

[Accessing ESS Using a Smartcard](#)

[Accessing ESS Using a Username and Password](#)

[Accessing ESS on Your Home PC or Mobile Device](#)

## **How to Access Your ESS Username and / or Password**

### **Viewing the Portal on ESR**

### **How to View Your Payslip**

### **How to Update Your Address**

### **How to Update Your Telephone Number**

## How to Access Employee Self Service (ESS)

To access your ESS account you will need an nhs.net e-mail account. Please contact the IT Department to request an account if you don't already have an nhs.net account.

ESS can be accessed via a Trust computer either by using your smartcard (if you already use it to access ESR) or via a username and password.

ESS can also be accessed via the MY ESR app which is a free app available for download to a mobile phone or tablet.

### Accessing ESS from a Trust Computer

Open the SaTH intranet page homepage and click on the NHS ESR icon within the Apps section on the SaTH intranet homepage.

If you are accessing ESR ESS for the first time or have forgotten your username and password, you will need to follow the steps in the **How to Access your ESS Username and Password** section.

You will require an NHS.net email account to access ESR. Please contact IT if you don't have an NHS.net email account.



### Accessing ESS Using a Smartcard

If you already possess a smartcard, you can access your ESS account by logging onto ESR by clicking on the NHS ESR icon within the Apps section on the SaTH intranet homepage where you will then be taken to the ESR portal homepage.



#### Log in with your Smartcard

Access ESR by inserting your Smartcard and entering your PIN, and then selecting the 'Log in via Smartcard' button

Log in via Smartcard

## Accessing ESS Using a Username and Password

If you already possess an ESR username and password you can access your ESS account by logging onto ESR in the way you normally do and navigate to the ESR portal homepage. If you have forgotten your username and password, select **My ESR** and then follow the steps in the [How to Access your ESS Username and Password](#) section

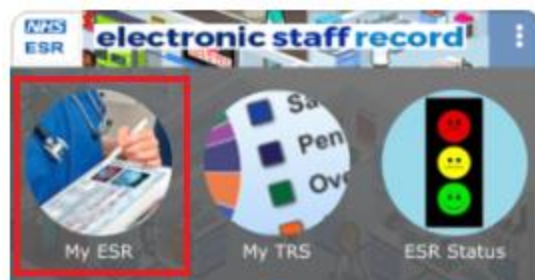
**Log in with your credentials**  
Fields with an asterisk (\*) are required fields  
  
Username\*   
(Example: 999JSMITH01)  
  
Password\*   
  
[Forgotten](#) | [Request Username/Password](#) | [Unlock Account](#)

## Accessing ESS on Your Home PC or Mobile Device

You can access ESR at home from the internet by following the below link.

<http://my.esr.nhs.uk>

You can also go to the App store and download the MY ESR app which is available for IOS devices.

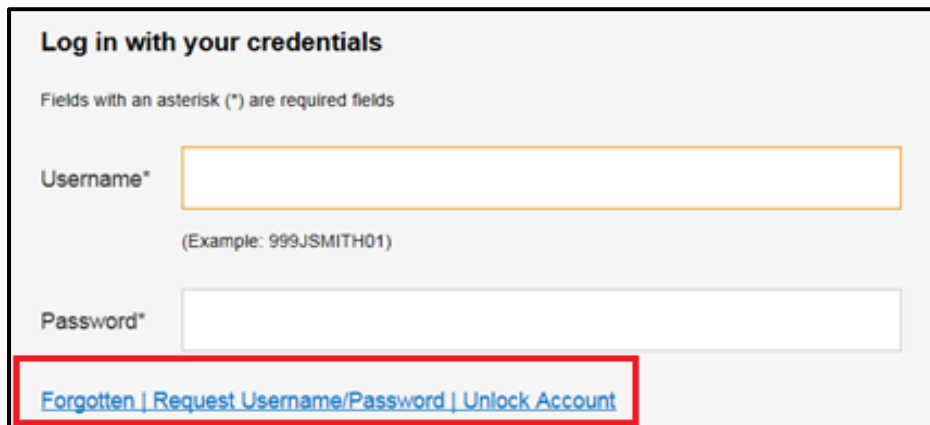


If you are accessing ESR ESS for the first time or have forgotten your username and password, select **My ESR** and then follow the steps in the [How to Access your ESS Username and Password](#) section below.

Please note, you will require an NHS.net email account to access ESR. Please contact IT if you don't have an NHS.net email account.

## How to Access Your ESS Username and Password

When the login screen appears click the [Forgotten | Request Username/Password | Unlock Account](#) link located under the Password box.



**Log in with your credentials**

Fields with an asterisk (\*) are required fields

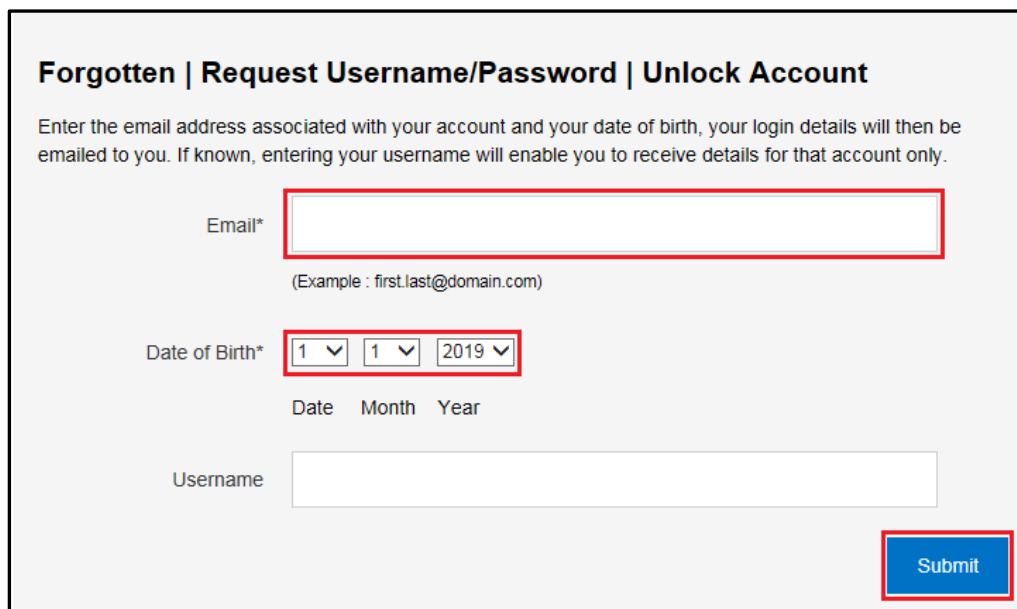
Username\*

(Example: 999JSMITH01)

Password\*

[Forgotten | Request Username/Password | Unlock Account](#)

When prompted, enter your **NHS.net email** address along with your **date of birth** and then click **Submit**.



**Forgotten | Request Username/Password | Unlock Account**

Enter the email address associated with your account and your date of birth, your login details will then be emailed to you. If known, entering your username will enable you to receive details for that account only.

Email\*

(Example : first.last@domain.com)

Date of Birth\*

Date Month Year

Username

**Submit**



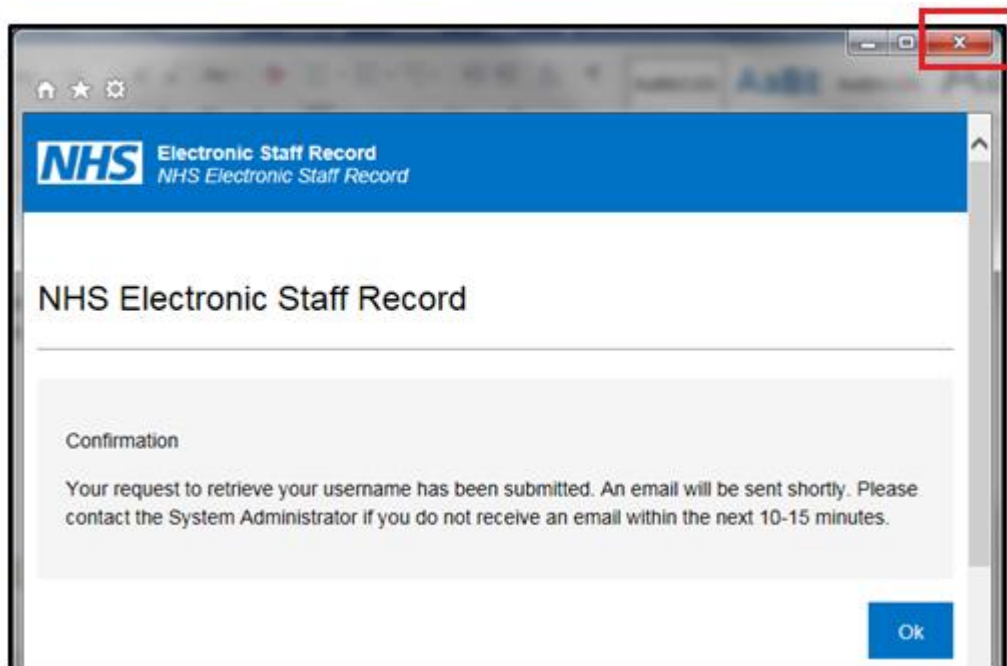
*You do not need to enter your **Username**.*

*Your username will be included in the automated email.*

Your login credentials, including your username, will then be emailed to your NHS.net email address.

*Please note there can be a brief delay to your credentials coming through as this is an automated process.*

When the below screen appears close the screen by clicking on the **X** and check for an email from Production Workflow, ESR (NHS ELECTRONIC STAFF RECORD) in your NHS.net email account.

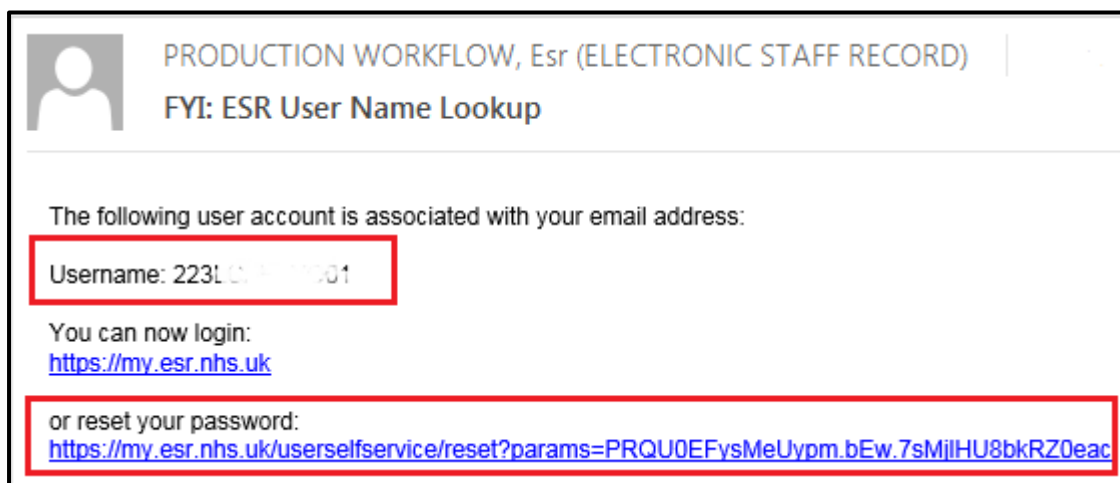


*If you click **OK**, you will be directed back to the login screen.*

*Close the login screen and follow the link in your email*

Once you receive the email with your login credentials, **make a note of your username** as this will be required every time you login to ESR and will also be required when you are prompted to create your password.

Click the **Reset your password** link to setup your password.



When prompted, enter your **Username**.



*Your username will begin 223 followed by the first letter of your first name, first 6 letters of your surname, and end with 2 numbers.*

In the Password section you will be able to create a new password which must:

- Contain a minimum of 8 characters
- Not contain your first name, surname or user name
- Not contain more than 3 sequential numbers or characters eg 1234 or abcd
- Not contain special characters "()\*;,;<~/~\:

Once completed click the **Confirm Password** button.

Update Password

Fields with an asterisk (\*) are required fields

Please enter your username and password below. The password you enter below will be used to replace your old password

Username\*

(Example: 999JSMITH01)

Password\*

?

Confirm Password\*

Confirm Password

You will now be able to gain access to your ESR Employee Self Service Account.

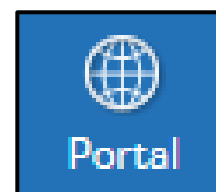


## Viewing the Portal on ESR

Once you have logged into ESR you will be taken to the portal page which consists of a number of “portlets” (shortcut windows) directing you to view various items of information including your personal information and payslips.

You will also be able to view any announcements relating to ESR such as when the latest payslips will be available to view or notifications about any downtime.

At any point you can return to the Portal by selecting the **Portal** icon from the blue ribbon at the top of the page.



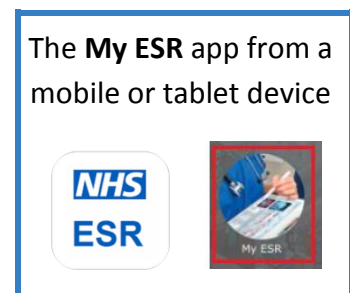
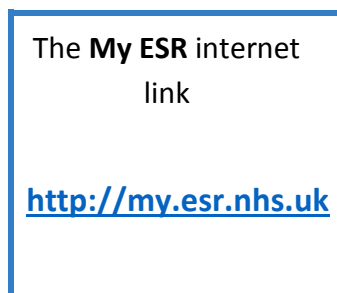
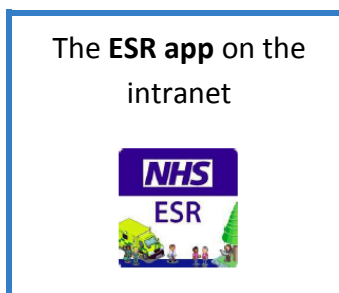


## How to View Your Payslip

Your payslip will be available to view each month via ESR Employee Self Service (ESS). Historic payslips and your P60 are also available to view via ESS for the duration of your employment with the Trust.

It is recommended that you save a copy of your payslip each month as you will not be able to access Employee Self Service or your electronic payslip/P60 once you have left the Trust.

Login to ESR using one of the following:



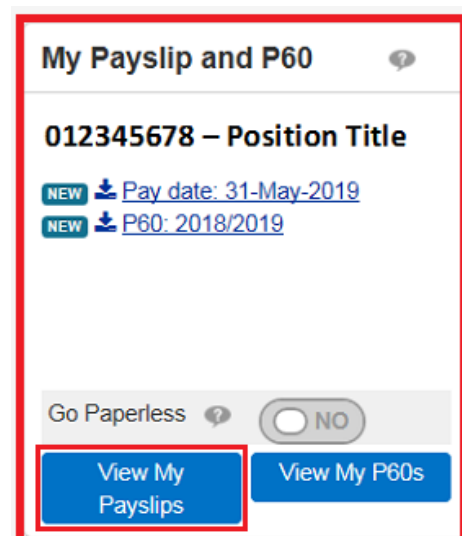
When prompted enter your username and password or login via your smartcard.

Log in via Username Password

Log in via Smartcard

From the portal page, within the **My Payslip and P60** portlet, select **View My Payslips**.

This portlet also allows you to view your P60s.

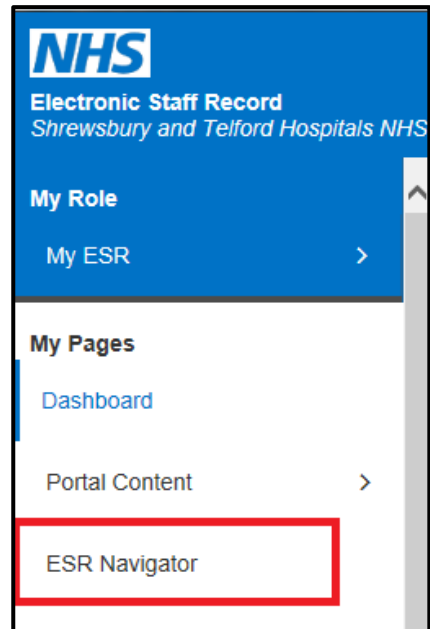


At any point you can return to the Portal by selecting the **Portal** icon from the blue ribbon at the top of the page.

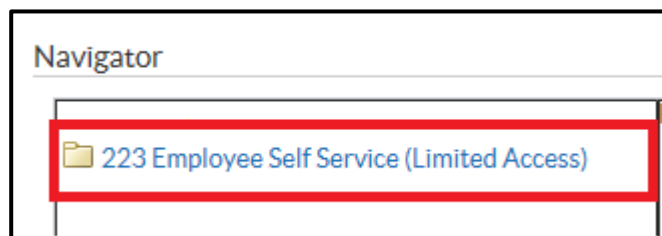


You can also access your payslip or P60 via the **ESR Navigator** on ESR

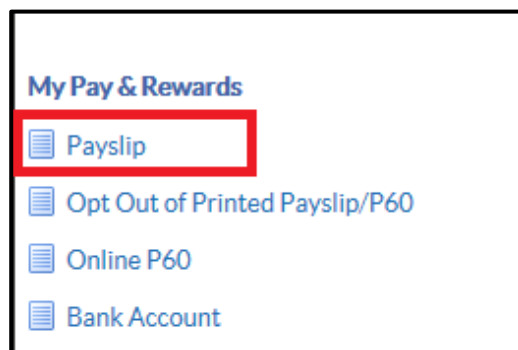
From the **My Pages** menu, select  
**ESR Navigator**



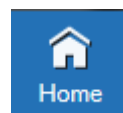
From the Navigator select  
**223 Employee Self Service (Limited Access)**



Under the **My Pay and Rewards**  
section, select **Payslip**



At any point you can return to the Navigator menu by selecting the  
**Home** icon from the blue menu ribbon at the top of the page



When the search window opens select the **Assignment Number** required using the drop down.

By default the most current payslip will be displayed; if required amend the **Year** and **Payslip** date using the drop downs.

Select **View Payslip** to view the payslip.

Search

Assignment Number **01234567**

Position Name **1232123** | My Position Title | Band X | Occupation Code | Area of Work

Year **2019**

Payslip **31-MAY-2019 - Assignment 01234567**

If blank, payslip is not produced for this period. Please contact your payroll administrator.


**View Payslip** Clear All

*NB the payslip dropdown menu may be blank if an assignment hasn't been worked for the relevant month eg a bank assignment that has not been worked.*

When prompted, either **Open** or **Save** your payslip.

Do you want to open or save **ePayslip.pdf (7.92 KB)** from **my.esr.nhs.uk?**


Open Save Cancel

ASSIGNMENT NUMBER		EMPLOYEE NAME		LOCATION							
20000237		Miss Sally Sath									
DEPARTMENT		JOB TITLE		PAYSCALE DESCRIPTION							
Ward 1		Staff Nurse Band 5		Review Body Band 5							
	SAL/WAGE		INC. DATE		PT SAL/WAGE						
	25298.00				37.5						
	TAX OFFICE NAME		TAX OFFICE REF		NI NUMBER						
	Dummy Office Name		999/Z9999		1000L NONCUM AB123456A						
PAY AND ALLOWANCES (+ = MINUS AMOUNT)					DEDUCTIONS (+ INDICATES REFUND)						
DESCRIPTION		WAGE/EARNED	PAID/DUE	RATE	AMOUNT	DESCRIPTION		AMOUNT	BALANCE OF		
Basic Pay		162.95	162.95	12.9378	2108.17	PAYE		215.60			
						NI A		172.34			
						NHS Pension 9.3%		196.06			
Year To Date Balances (This Employment Only)						This Period Summary					
GROSS PAY		2108.17		TAXABLE PAY		1912.11		PENSIONABLE PAY		2108.17	
NI LETTER		A		TAX PAID		215.60		TAX PERIOD		7	
NI PAY		2108.17	OTHER NI PAY		PREVIOUS TAXABLE PAY		0.00		FREQUENCY		Monthly
NI CONTRS		172.34	OTHER NI CONTRS		PREVIOUS TAX PAID		0.00		PERIOD END DATE		30 NOV 2017
PENSIONABLE PAY		2108.17		PENSION CONTRS		196.06		PAY DATE		25 NOV 2017	
SO REF NUMBER				EMPLOYEE NO.		20000237		PAY METHOD		BACS	
										NET PAY	1524.17

## How to Update Your Address

Login to ESR using one of the following:


The **ESR app** on the intranet



The **My ESR** internet link

<http://my.esr.nhs.uk>

The **My ESR** app from a mobile or tablet device



When prompted login using your **Username** and **Password** or login via your **Smartcard**.

Log in via Username Password

Log in via Smartcard

From the portal page select **Update My Personal Information** under the **My Personal Information** portlet.

**My Personal Information** ?

**Name:** Sally Sath >

**Address:** 1 Somewhere Street  
Any Town, County,  
AB12 3CD

**Home:** 01232 789876

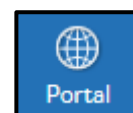
**Mobile:** 07898 234567

**Email:** Sally.Sath@nhs.net

**Position:** Position Title

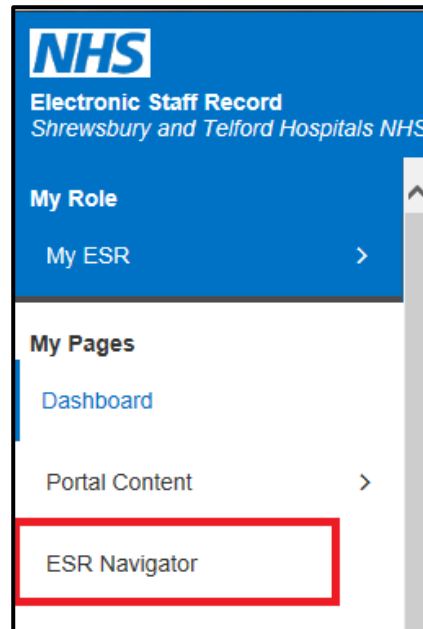
Update My Personal Information

At any point you can return to the Portal by selecting the **Portal** icon from the blue ribbon at the top of the page.

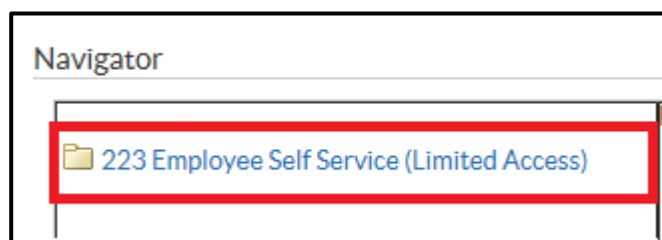


You can also access your personal information via the **ESR Navigator**.

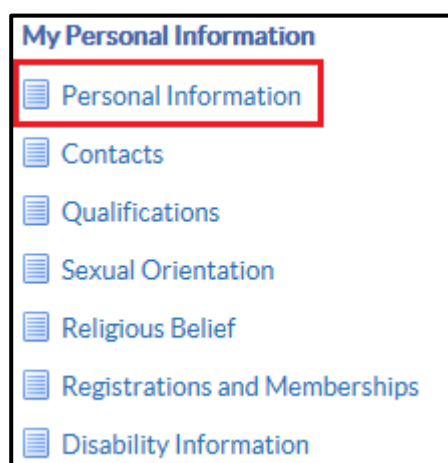
From the **My Pages** menu select  
**ESR Navigator**



From the Navigator select  
**223 Employee Self Service  
(Limited Access)**



Under the **My Personal  
Information** section  
select **Personal Information**



At any point you can return to the Navigator menu by selecting the  
**Home** icon from the blue menu ribbon at the top of the page



When the **Personal Information** section opens, under **Addresses**, select **Update**.

## Personal Information

Employee Name	Sath, Mrs. Sally
Employee Number	01234567

### Addresses

Update

Address Line 1	1 Somewhere Street
Address Line 2	
Address Line 3	
Town	Any Town
County	County
Post Code	AB12 3CD
Country	United Kingdom
Type	Home

If you believe there is an error with your address that needs to be corrected select **Correct or amend this address**.

If you have moved house and need to add a new address, select **Enter a new address if you have moved**.

Once you have made the appropriate selection select **Next**.

## Main Address: Choose Option

CancelNext

Employee Name	Sath, Mrs. Sally
Employee Number	01234567

Select the type of change you want to make: Correct if details of the address are incorrect, or enter a new address.

☐ Correct or amend this address.

☒ Enter a new address if you have moved.



From the **Main Address** screen enter the **Effective Date** of the change of address.



Use the **Find Address** button to find your address.


## Main Address: Enter New Address

Employee Name **Sath, Mrs. Sally**  
Employee Number **01234567**

Enter the date your change takes effect. Use the Find Address button and enter your Post Code.

\* Effective Date   

Type   

Country  


UK Address Style

\* Address Line 1

Address Line 2

Address Line 3

Town

County  

Post Code

**Find Address**

\* Indicates required field

When prompted enter the **Building number or name** and **Postcode** and then select **Next**.

Building number or name  (eg. 12)

Postcode  (eg. BS40 5SJ)

Country

[If you're unsure of some of the information requested, click here.](#)  
[Or use Keyfinder search.](#)



Select the correct  
address then select **Next**.

Select one of the following addresses that matched your selection.

☐ 1 Anyplace Street, Somewhere Town, COUNTY EF34 5GH

☒ 2 Anyplace Street, Somewhere Town, COUNTY EF34 5GH

☐ 3 Anyplace Street, Somewhere Town, COUNTY EF34 5GH

☐ 4 Anyplace Street, Somewhere Town, COUNTY EF34 5GH

[Cancel](#) [Back](#) [Next](#)

Confirm that the address  
is correct by selecting **OK**.

Please confirm that your address below is correct.

Address Line 1

Address Line 2

Address Line 3

Town/City

County

Postcode

[Cancel](#) [Back](#) [OK](#)

Review the changes  
being made which  
are indicated by blue  
icons.

Click **Submit** to  
make the changes.

Main Address		
	Current	Proposed
Country	United Kingdom	United Kingdom
Address Line 1	1 Somewhere Street	2 Anyplace Street
Address Line 2		
Town	Any Town	Somewhere Town
County	COUNTY	COUNTY
Post Code	AB 12 3CD	EF34 5GH
Type	Home	Home

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Select **Return to Overview**  
to return to the **Personal  
Information** screen.

Search | Home | Favorites | Settings | Help | Logout | Portal

Confirmation


Your changes have been applied.

[Return to Overview](#)

## How to Update Your Telephone Number

Login to ESR using one of the following:


The Sath app on the intranet



The My ESR internet link

<http://my.esr.nhs.uk>

The My ESR app from a mobile or tablet device



Access the **Personal Information** menu via one of the following from the **Portal**:

### The **Navigator** Menu

**My Pages**

Dashboard

Portal Content >

**ESR Navigator**

**Navigator**

223 Employee Self Service (Limited Access)

**My Personal Information**

**Personal Information**

Contacts

### The **My Personal Information** Portlet

**My Personal Information** ?

**Name:** Sally Sath >

**Address:** 1 Somewhere Street  
Any Town, County,  
AB12 3CD

**Home:** 01232 789876  
**Mobile:** 07898 234567  
**Email:** Sally.Sath@nhs.net  
**Position:** Position Title

**Update My Personal Information**

From the Personal Information screen select **Update** under the **Phone Numbers & Personal E-Mail**.

### Personal Information

Employee Name Sath, Mrs. Sally

Employee Number 01234567

### Phone Numbers & Personal E-Mail

Home 01232 456987

Mobile 09878 654123

**Update**

Use the dropdown under **Type** to select relevant type of number. If changing a number enter the new number within the **Number** field.

Type	Number	Delete
Home	01323 654456	
Mobile	09878 654123	

If a new row is required, click the icon.

If a number is to be deleted click the icon to delete the row.

Review changes indicated by blue icon and click **Submit**.

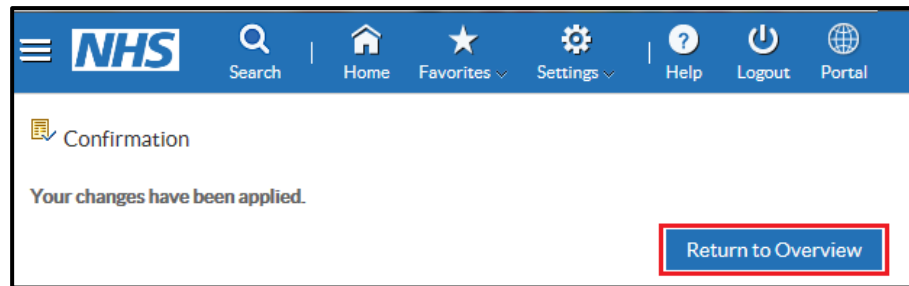
Indicates Changed Items.

### Phone Numbers

	Current	Proposed
Home	01232456987	01323 654456
Mobile	09878 654123	09878 654123

[Cancel](#)
[Printable Page](#)
[Back](#)
[Submit](#)

Select **Return to Overview** to return to return to the **Personal Information** screen.



Please note that personal e-mail addresses stored under this section cannot be used for receiving notifications from ESR or a registered e-mail address to receive password or username notifications when accessing ESR.