

Maximising the ESR Portal

8th May

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Housekeeping

- All attendees will be on mute
- Type any questions into the chat box
- All questions will be added to an FAQ document which will be sent to all attendees when all Webinars completed
- Copies of slides will be available once all webinars completed
- The session will be recorded for future reference and sharing

The purpose of this webinar is to build upon the launch of the new ESR portal, to further education and raise awareness of the functionality available, and to engage and inspire organisations to fully optimise the system to meet their needs.

Webinar Content:

- ESR Portal & Portlets – the latest statistics
- Employee Self Service – Portal Benefits
- Manager Self Service – Portal Benefits
- Professional Users Dashboards
- Benefits to the organisation
- Our Portal:
 - **Nottinghamshire Healthcare NHST**
 - **Derbyshire Healthcare NHSFT**
 - **NHS Provide**
- Portal Developments
- Next steps for organisations
- Summary & Support

ESR Portal Statistics





709,429 individual employees have now accessed the Portal

46.4% of all employees with user accounts have now accessed their Portal

Total portal logins are now 11,538,364. 1,908,894 logins during March 2018.

510,624 users logged into ESS/ESSLA in the 30 day reporting period to 5th March 2018

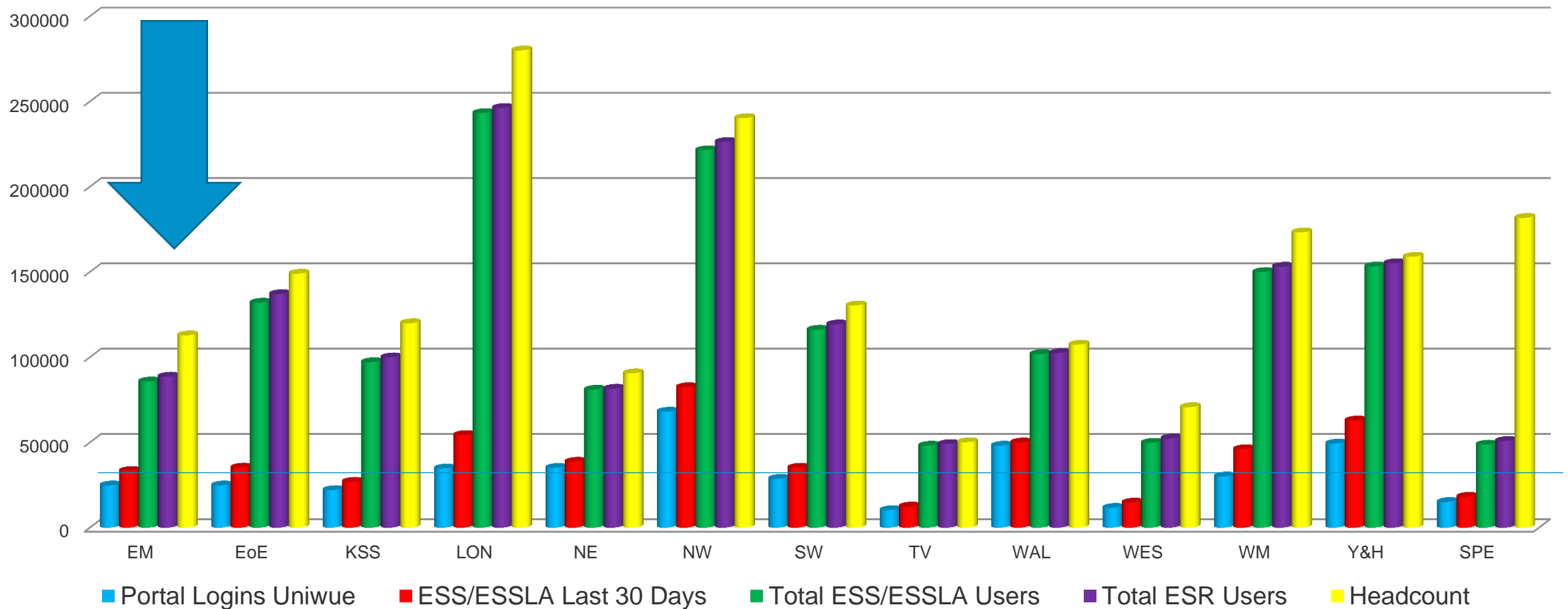
74.36% of SSHR users in March 2018 used my.esr only. A further 8.9% used both routes during month.

22.37% – 416,596 of employees now opted out of Printed Payslip

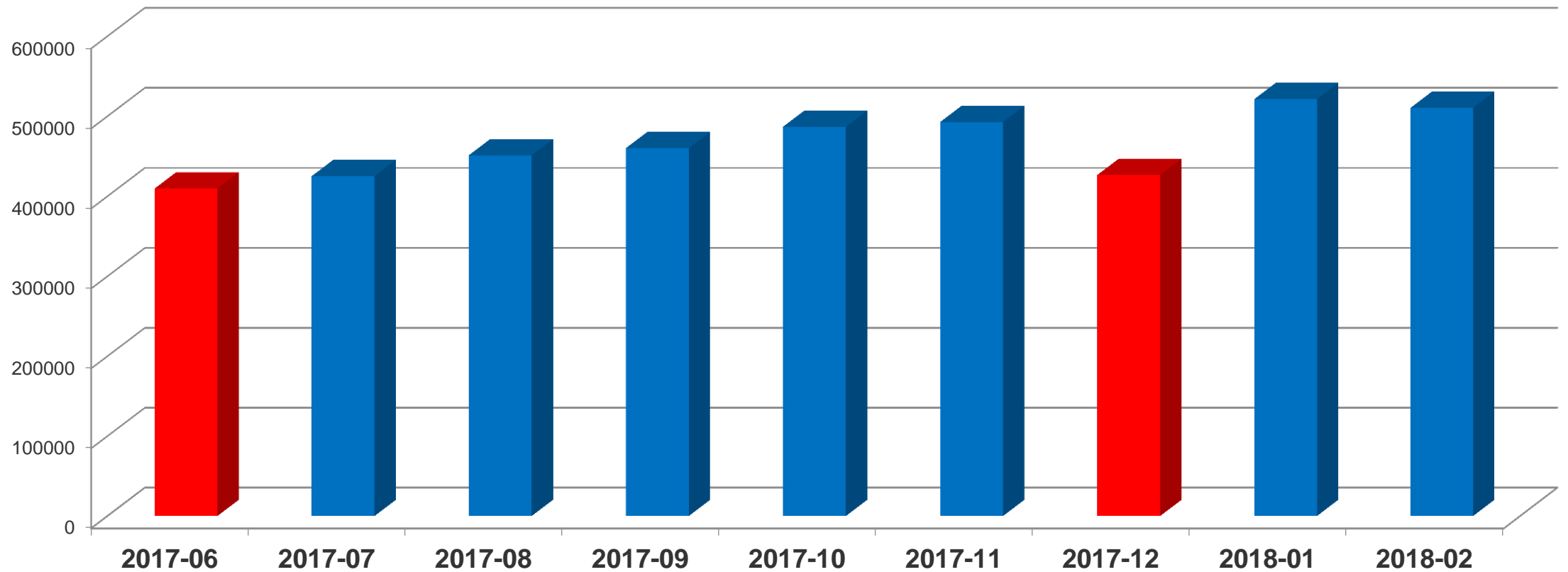
159,713 employees viewed their payslip through the ESR Portal in March 2018. . 230,906 directly from self service.

16.74% of Personal/Absence/Assignment changes undertaken in SSHR

Portal/ESS Usage In Relation to Total ESR Users and Headcounts as at 28th March 2018

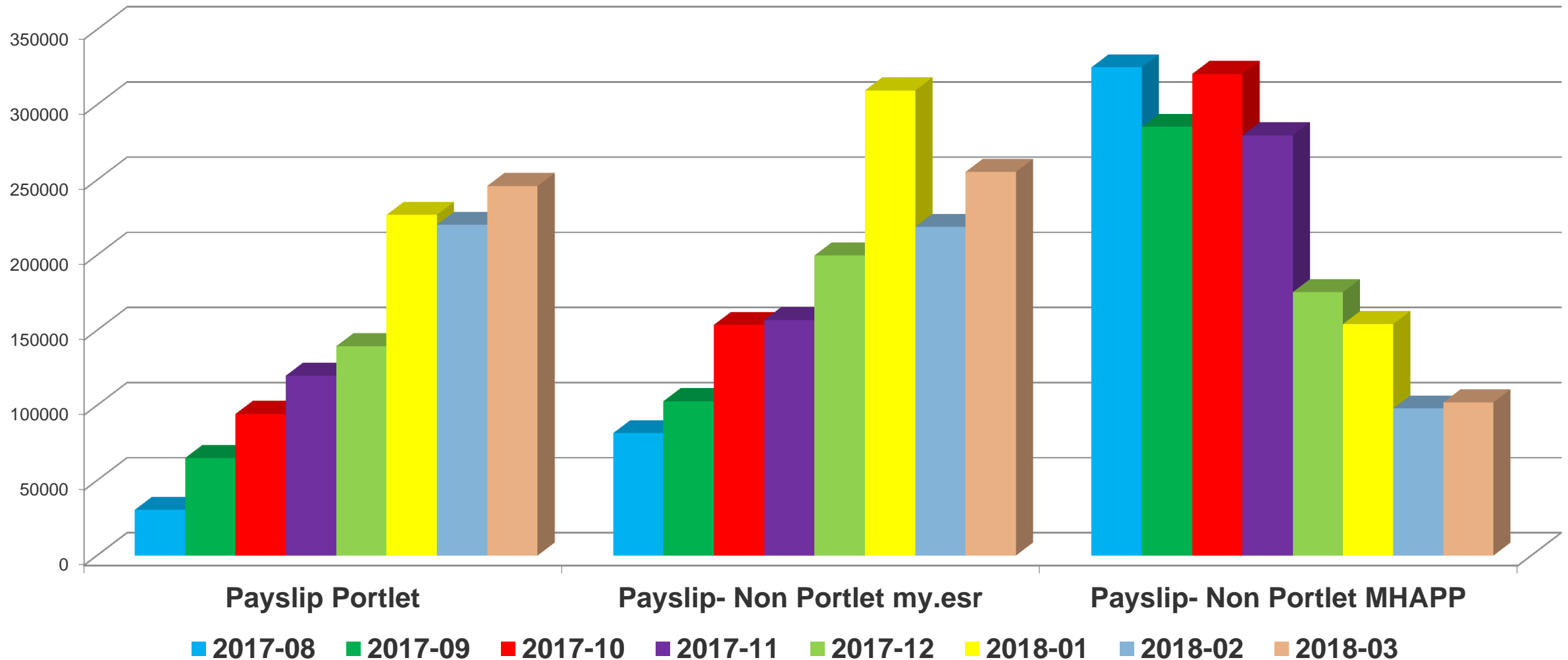


12 Month Timeline - ESS/ESSLA Logins - Based on Previous 30 days Data Extracted 5 March 2018



*December 2017 was a shorter month due to the 12.2 downtime

Access Points for Payslips- Total Views

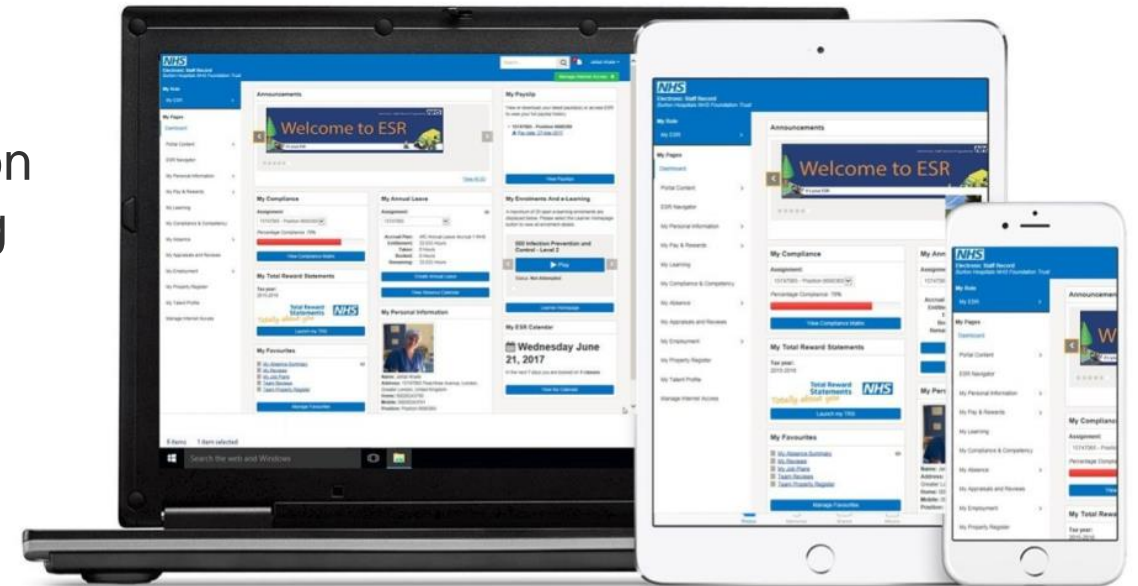


Employee Self Service



The Portal is the new gateway into ESR for all NHS employees

- It is an easy to use browser-based system that can be accessed in the workplace or on the move via the internet
- Self Service functionality gives every ESR user the ability to manage their own data
- Self Service via the Portal has been designed to be intuitive
- Employees are presented with information portlets on the landing page as soon as they log in – presenting key Information immediately.

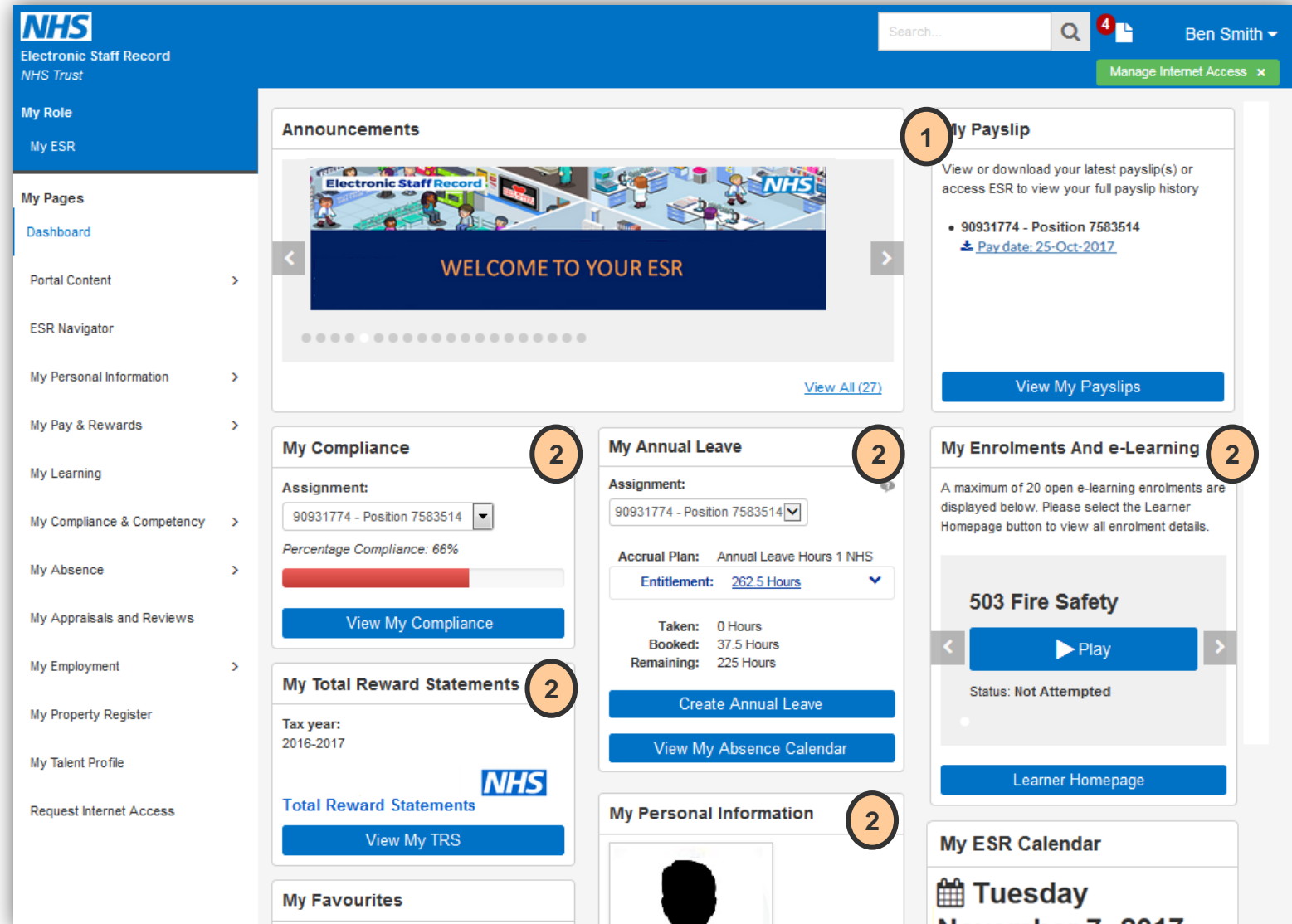


Easy to navigate user interface


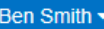

The Portal is designed to be intuitive and easy to use, giving you access to all Employee Self Service functionality.

1 Announcement and Payslip Portlets are fixed

2 Other Portlets can be removed or relocated by the Portal Administrator




NHS
Electronic Staff Record
NHS Trust

Search...  4 Ben Smith 
Manage Internet Access 

My Role
My ESR

My Pages
Dashboard
Portal Content >
ESR Navigator
My Personal Information >
My Pay & Rewards >
My Learning
My Compliance & Competency >
My Absence >
My Appraisals and Reviews
My Employment >
My Property Register
My Talent Profile
Request Internet Access

Announcements


WELCOME TO YOUR ESR
[View All \(27\)](#)

1 My Payslip
View or download your latest payslip(s) or access ESR to view your full payslip history

- 90931774 - Position 7583514
[Pay date: 25-Oct-2017](#)

[View My Payslips](#)


2 My Compliance
Assignment:
90931774 - Position 7583514
Percentage Compliance: 66%
[View My Compliance](#)


2 My Annual Leave
Assignment:
90931774 - Position 7583514
Accrual Plan: Annual Leave Hours 1 NHS
Entitlement: 262.5 Hours
Taken: 0 Hours
Booked: 37.5 Hours
Remaining: 225 Hours
[Create Annual Leave](#)
[View My Absence Calendar](#)

2 My Total Reward Statements
Tax year:
2016-2017
[View My TRS](#)

2 My Enrolments And e-Learning
A maximum of 20 open e-learning enrolments are displayed below. Please select the Learner Homepage button to view all enrolment details.

503 Fire Safety
[Play](#)
Status: Not Attempted
[Learner Homepage](#)

My Personal Information


My ESR Calendar
 Tuesday
November 7, 2017


Improved Data Quality

The Portal and Portlets Encourages the employee to feel a greater sense of ownership about their personal & professional data.

The employee feels empowered to manage their own data, thus maintaining its accuracy.

This can enable the organisation to remove the need for paper forms for these changes

My Personal Information



Name: Ruwani Fiona DAVARI
Address: 15848146 Peachtree Avenue, London, Greater London, United Kingdom
Mobile: 00026390104
Position: Position 7790857

[Update My Details](#)

NHS Home Logout Preferences Help Portal

Personal Information [Back](#)

Employee Name: Smith, My Ben
Employee Number: 26530532

Basic Details [View and Update](#)

Full Name: Smith, My Ben
Marital Status:
Date of Birth: 05 Jan 1974
NI Number: AA7744115
Employee Number: 26530532
Work Email Address:
TIP To view further basic details including e-mail address, gender and nationality, click the 'View and Update' button.

Phone Numbers & Personal E-Mail [Update](#)

Home: 01936425795

Addresses [Update](#)

Address Line 1: 11 High Street
Address Line 2: Warwick Gates
Address Line 3:
Town: Warwick
County: Warwickshire
Post Code: CV34 7JT
Country: United Kingdom
Type: Home

My Personal Information portlet provides the employee a quick link to their personal data, with the added ability to allow them to update this immediately. *Planned developments – to create a collapsible region in the portlet containing the current visible information. Only the photo and name will be initially visible.*

On-line Payslips

Employees have access to their payslips before payday.

Moving to on-line payslips has the ability to reduce internal payslip distribution costs and eliminates missing paper payslips

My Payslip

View or download your latest payslip(s) or access ESR to view your full payslip history

- 15848146 - Position 7790857
[Pay date: 27-Jun-2017](#)
- 15848146-2 - Position 7855999
[No Payslip Available](#)

[View Payslips](#)

Search

* Assignment Number
Position Name
Year
Payslip

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

[View Payslip](#)

[Clear All](#)

My Payslip portlet will display a link to the most recent payslip. Historical payslips can also be accessed and be printed or saved to a secure location.

Planned development - Update to Payslip Portlet to include link to P60 and ability to opt out of Paper Payslips.

Real time Management of Information

ESR is a live real-time system. Any changes made in the portal or the core system are immediately reflected in the other.

Compliance is displayed by positions held.

My Compliance

Assignment:

13817540 - Estates Manager

Percentage Compliance: 4%

View Compliance Matrix

Compliance and Competency

1

Employee Name: Lee, Chris
Employee Number: 20000573

Compliance: All Competencies Awaiting Approval

20000573 - Staff Nurse Band 6

Go Compliance Percentage: 44.4%

Required Competencies Only

Export	Printable Page	Competency Name	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning
>	Show	NHS(CSTF)Equality, Diversity and Human Rights - 3 Years	1	1	Y	31-Jan-2020		
>	Show	NHS(CSTF)Fire Safety - 2 Years	1	1	Y	30-Nov-2016		
>	Show	NHS(CSTF)Infection Prevention and Control - Level 2 - 1 Year	1	1	N	31-Jan-2018		
>	Show	NHS(CSTF)Information Governance - 1 Year		1	Y			
>	Show	NHS(CSTF)Moving and Handling - Level 1 - 3 Years		1	Y			
>	Show	NHS(CSTF)Safeguarding Children - Level 2 - 3 Years	1	1	N	31-Jan-2020		
>	Show	NHS(KSF)Communication C1/Core	2	3	Y	No Expiry		
>	Show	NHS(KSF)Health, Safety and C3/Core	2			No Expiry		
>	Show	NHS(KSF)Service Improvement C4/Core		2	N			

My Compliance portlet provides an easy to view compliance summary.

- 1 The button will launch the Compliance and Competency page where employees can view their compliance in more detail.
- 2 Ability to search for and undertake/book learning from compliance matrix associated with training requirements.

Real time Management of Information

Any information recorded in ESR is immediately reportable, giving real time information for employees and managers.

My Annual Leave portlet provides key information about annual leave entitlements e.g. hours taken vs. hours remaining, if the organisation uses ESR to record absence.

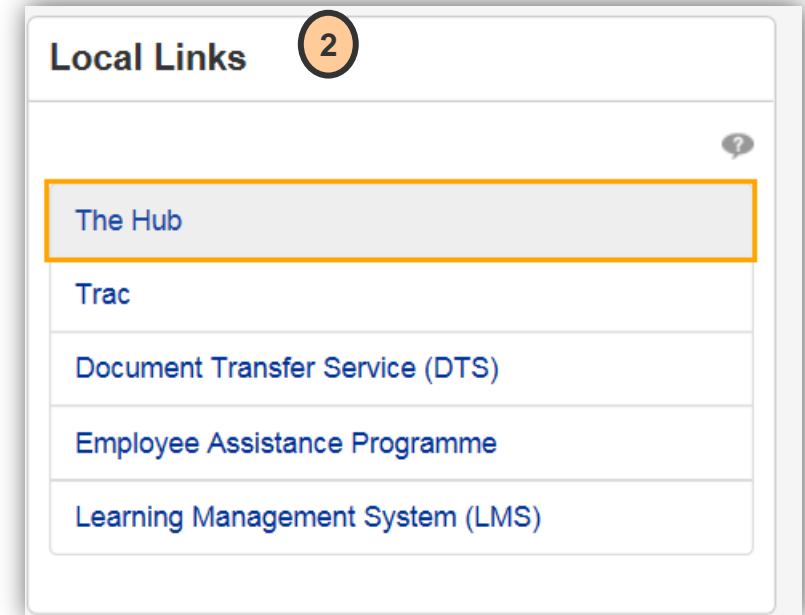
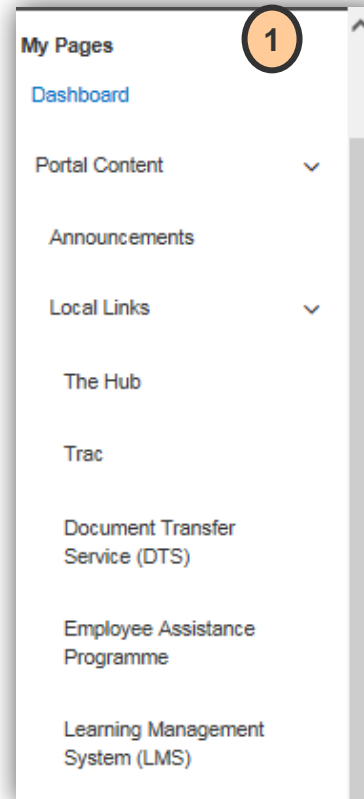
- 1 Annual leave can be requested directly via the portlet.
- 2 The employee can view their absence calendar directly via the portlet.

The image displays three screenshots of the NHS Employee Self Service (ESS) interface. The first screenshot, labeled '1', shows the 'My Annual Leave' portlet. It displays the employee's assignment (13817540) and their annual leave entitlements: Annual Plan: Annual Leave Hours 1 NHS, Entitlement: 175.5 Hours, Taken: 90 Hours, Booked: 0 Hours, and Remaining: 85.5 Hours. Below this, there are two buttons: 'Create Annual Leave' (labeled '1') and 'View Absence Calendar' (labeled '2'). The second screenshot, labeled '1', shows the 'Create Absence: Enter Absence Details' screen. It includes fields for Employee Name (Zappa, Mr Smith), Employee Number (13817540), Absence Type (Annual Leave), Absence Reason (Annual Leave), Start Date, End Date, Start Time, End Time, and a 'Calculate Duration' button. There is also a calendar view for December 2016. The third screenshot, labeled '2', shows the 'Absence Calendar' screen. It displays a calendar grid for the year 2016, with columns for each month and rows for each day. The calendar shows the number of days in each month and the days of the week. The employee's name (Smith, Ben) and employee number (20000220) are displayed at the top.

Access to other key systems & information

Links to other web-based systems and internet links can be added by the Organisation.

This enables the ESR Portal to seamlessly become the **gateway to other internal & external systems**



Local Links are available to the Portal Administrator to populate with useful local links for the organisation.

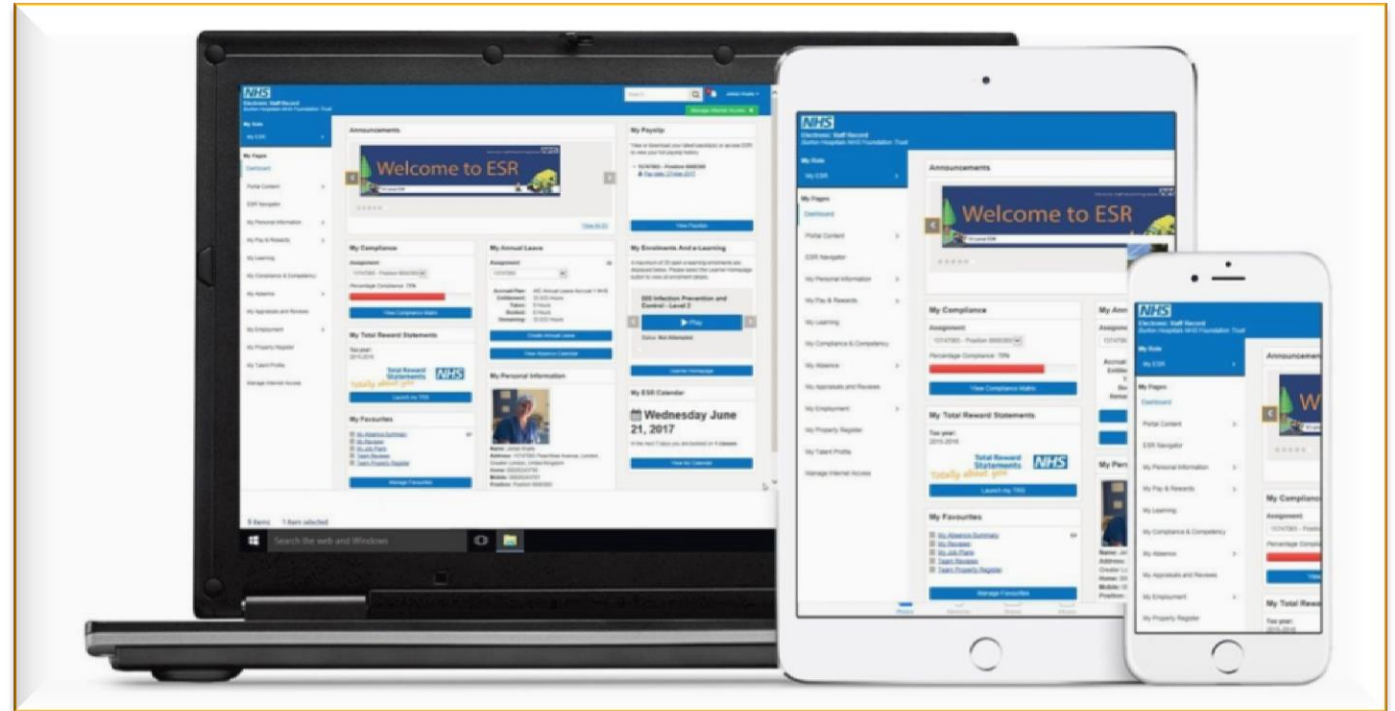
- ① They can be viewed via the navigation pane.
- ② They can be viewed via local links portlet, which can be added to the employees portal view.

Accessible on different platforms

Employee Self Service is available outside of NHS networks.

It is also available on different devices. Making it truly portable.

Planned development – To enable automatic remote access



If an employee logs into ESR with a username & password this can be used to access ESR away from the workplace. If a Smartcard is used a different Password has to be created. Initial setup for Internet Access has to take place on an NHS network (i.e. N3), and can be done via the Portal. Once approved (automatic available) the employee can access ESR via the internet at any time and on any device.

My ESR App

The ESR app is easy to use across Apple, Android and Blackberry devices.

Once an employee has requested Internet Access via ESR at work, (& it's been approved) they can download the My ESR App by searching for "ESR NHS". Username & Password are required for log in.

The ESR App has arrived

My Employee Self Service
Links to the Internet Self Service portal providing access to online Payslips, eLearning and the Absence calendar whilst on the move.

ESR News
The latest ESR News publications.

ESR Roadmap
Discover updates on the status of the ESR Roadmap activities.

ESR Events
A list of key ESR events taking place across England and Wales.

My TRS
Link to the NHS Total Rewards Statement website to view an overview of the Employment Benefits and the value of the employee NHS Pension Scheme benefits.

ESR Twitter
View the ESR Twitter feed.

Contact Us
Details of our various media channels.

→ Download the "MyESR" App via your mobile device providers App Store.
→ Test the App functionality and share your feedback using the ESR App Survey portal.
→ Please direct all queries about the to the App's Feedback/Chat function, or via: esr.interfaces@nhs.net

Manager Self Service

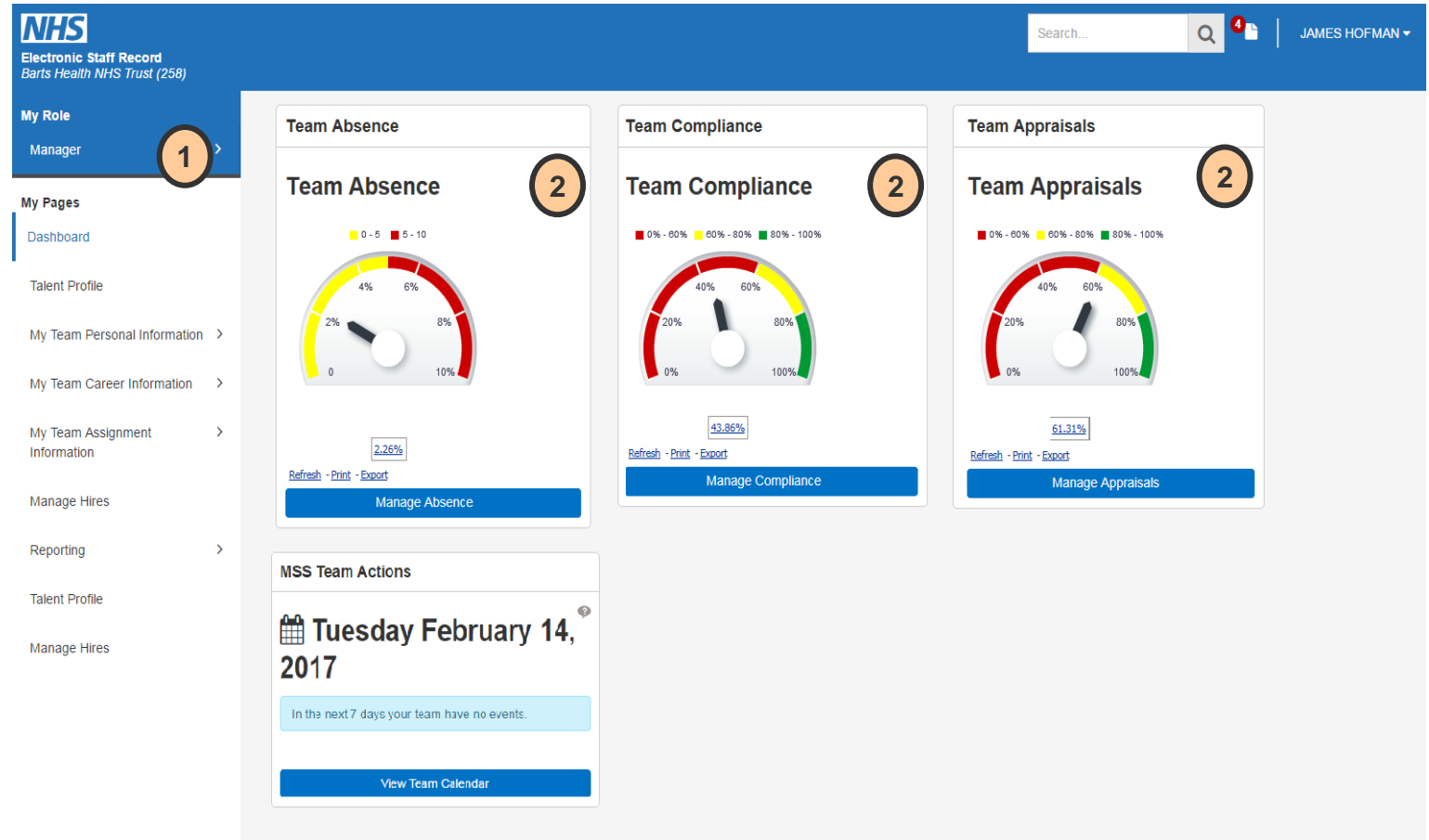


Manager Dashboard

The Manager Dashboard is available for all users with Manager, Supervisor or Administrator Self Service.

1 A manager can navigate to full ESR functionality by using the navigation pane.

Manager Self Service now available securely over the internet.



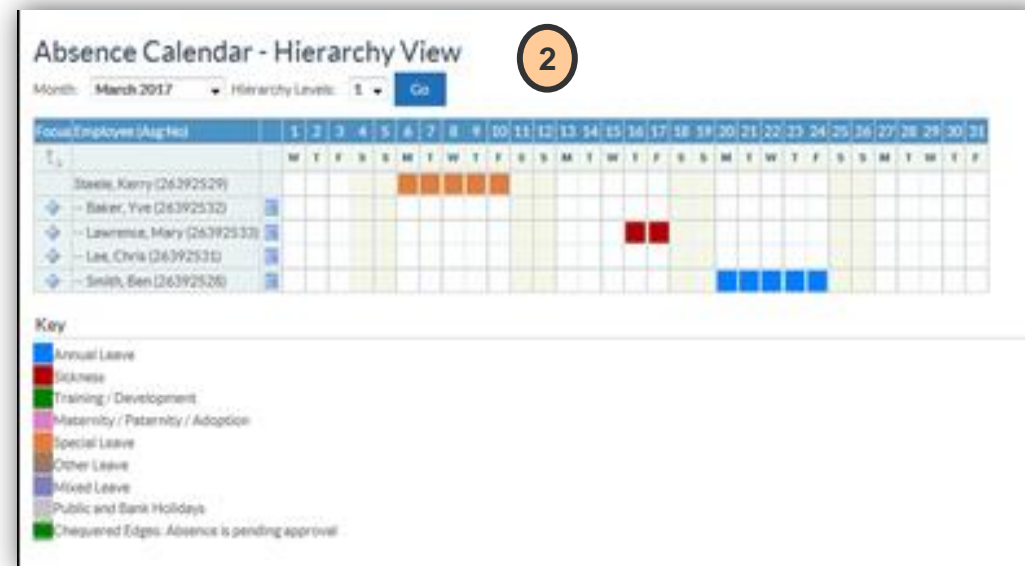
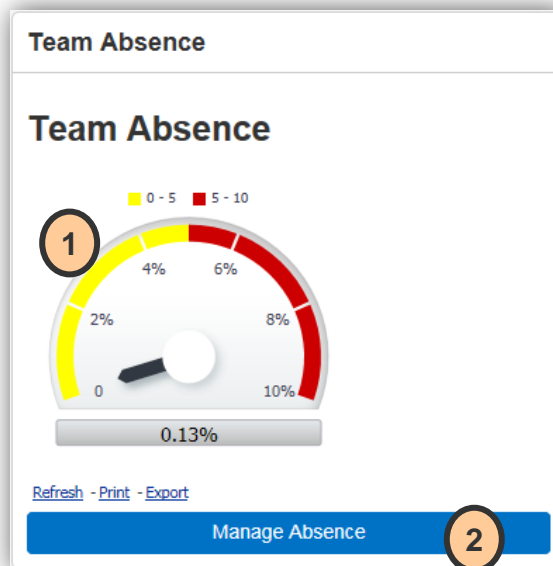
2 National BI Portlets use the BI reports to create easy to understand gauges.

Additional portlets can be added that relate directly to locally written BI reports. More manager portlets can be added by the organisation's Portal Administrator.

Team Absence

A manager can see what their team absence rate is in real-time providing ESR is used for all absence recording. (the gauge is updated the previous evening).

The portlet gives a quick entry point into ESR functionality and BI reporting.



Team Absence portlet displays a gauge showing the percentage absence rate for the Managers team.

- 1 Clicking the gauge will launch the NHS Team Absence KPI Report in the ESR BI reporting tool, allowing Managers to analyse the figures in more detail.
- 2 The Manage Absence button enables the manager to view and create absences for their staff.

Team Appraisals

A manager can see how their team is currently performing within their appraisal cycle.

The portlet gives instant access to appraisal data via the NHS Team Absence KPI report.



NHS My Team Career Information

Home Logout Performance Help Diagnosis

In Progress Completed Performance

Main Appraiser Reviewer and Participant

Appraisals and Reviews As Main Appraiser

These tables show in progress and completed Appraisals and Reviews for which you are Main Appraiser. You can also view Appraisals and Reviews for people in your people hierarchy (for which you may not be Main Appraiser). Click View Appraisals and Reviews in People Hierarchy.

View Appraisals and Reviews in People Hierarchy

Appraisals and Reviews In Progress

Enable Standard Appraisal View

0 Progress 15 OK 10 Not OK 4

Select All	Select None	Appraisal Title	Appraisal Date	Appraisal Status	Appraisal Person	Plan	Participation Status	Period Start Date	Period End Date	Completed	Tested & R	Reviewed	Clear Office Status	Updated	Print/Export Appraisal	Link	Notes
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	27 Jan 2017	Planned		Test 270117	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Sup AA Test	27 Jan 2017	Ongoing with Main Appraiser	Foundation	Test 270117	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Sup AA Test	27 Jan 2017	Ongoing with Main Appraiser	Medical Appraisal	Test Plan	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	30 Jan 2017	Saved	Prescription		Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	01 Jan 2017	Planned		Test Plan	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	01 Jan 2017	Planned		Test Plan	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	01 Jan 2017	Planned		Test 270117	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Main AA Test	01 Jan 2017	Planned		Test 270117	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Sup AA Test	01 Jan 2017	Ongoing with Main Appraiser	Performance Appraisal	Test Plan	Open	01 Jan 2017	30 Jan 2017	-		Review					
<input type="checkbox"/>	<input type="checkbox"/>	AA Sup AA Test	01 Jan 2017	Ongoing with Main Appraiser	Test Plan		Open	01 Jan 2017	30 Jan 2017	-		Review					

View Appraisals and Reviews in People Hierarchy

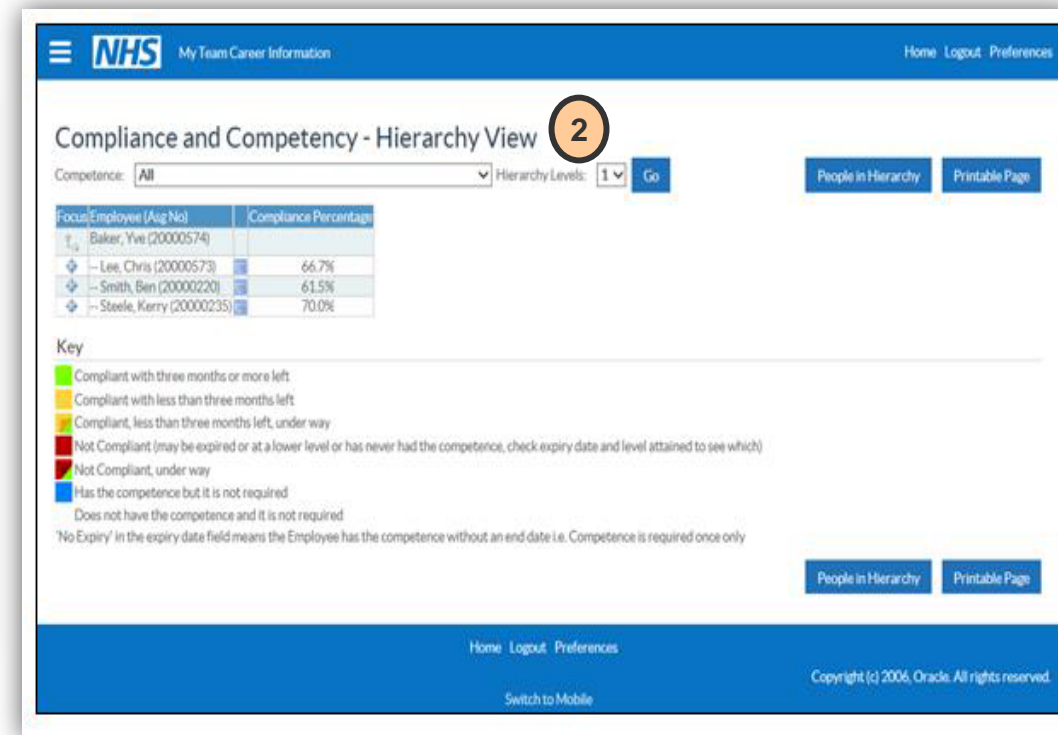
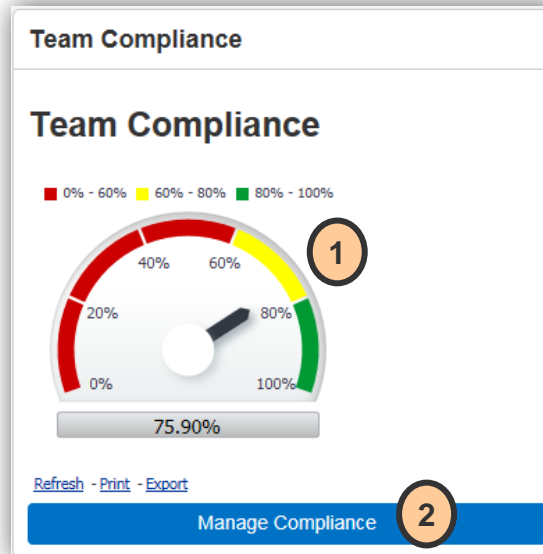
A manager is given the ability to manage appraisals directly from the **Team Appraisals** portlet.

- 1 Displays a gauge showing the percentage of employees that have completed Appraisals. Clicking on the gauge will allow Managers to analyse the figures in more detail
- 2 View further details of the completed Appraisals for the members of a team by clicking the manage appraisals button. .

Team Compliance

From this one portlet a manager can see their whole teams compliance percentage. Making it quick and easy to manage their staff's compliance rating.

This portlet gives the manager access to the NHS Team Compliance KPI report in BI.



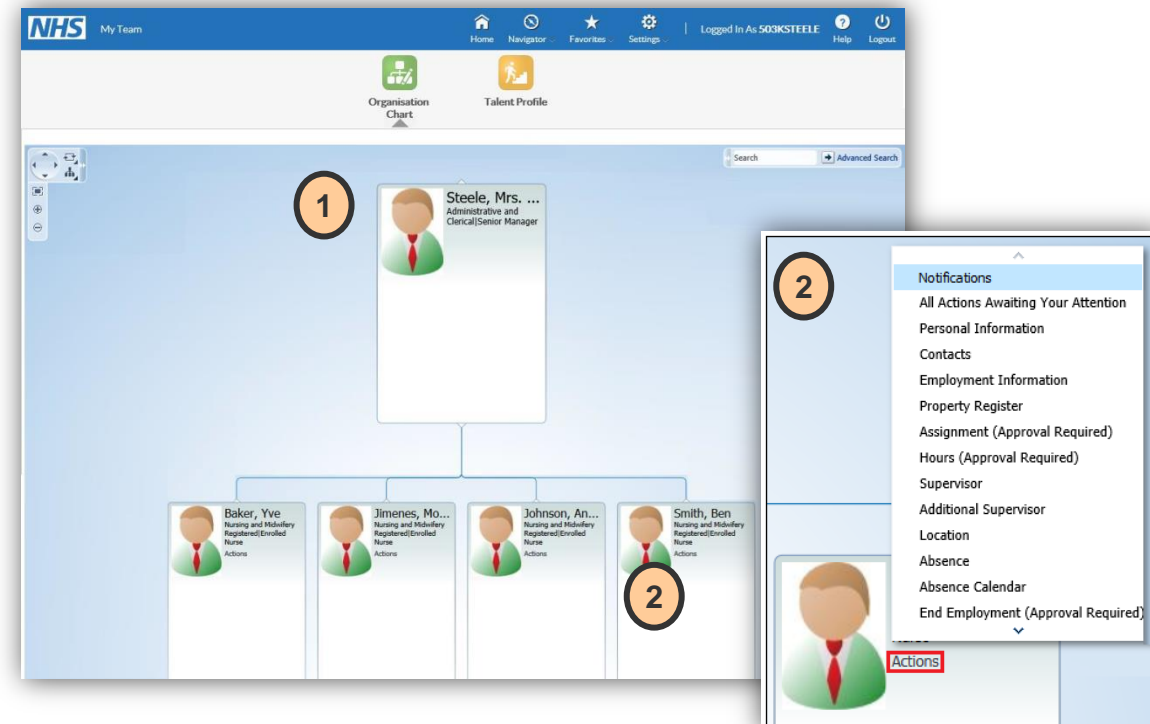
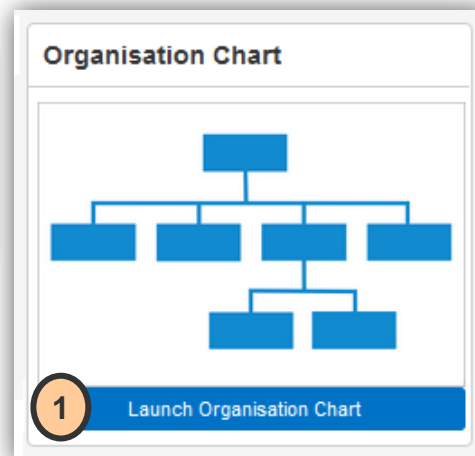
A manager is given the ability to manage and analyse their teams compliance directly from the **Team Compliance** portlet.

- 1 Displays a gauge showing the compliance percentage for the whole team. Clicking on the gauge will allow Managers to analyse the figures in more detail
- 2 View further details of the teams compliance can be accessed and analysed by clicking the manage compliance button. .

Organisation Chart

The Organisational Chart portlet gives the manager the opportunity to view their staff hierarchy in a purely visual way.

It can help to identify where staff are sitting in the incorrect hierarchy within ESR as its based on the supervisor hierarchy.



The newly developed **Organisational Chart** portlet showing in one click the staff hierarchy for a manager.

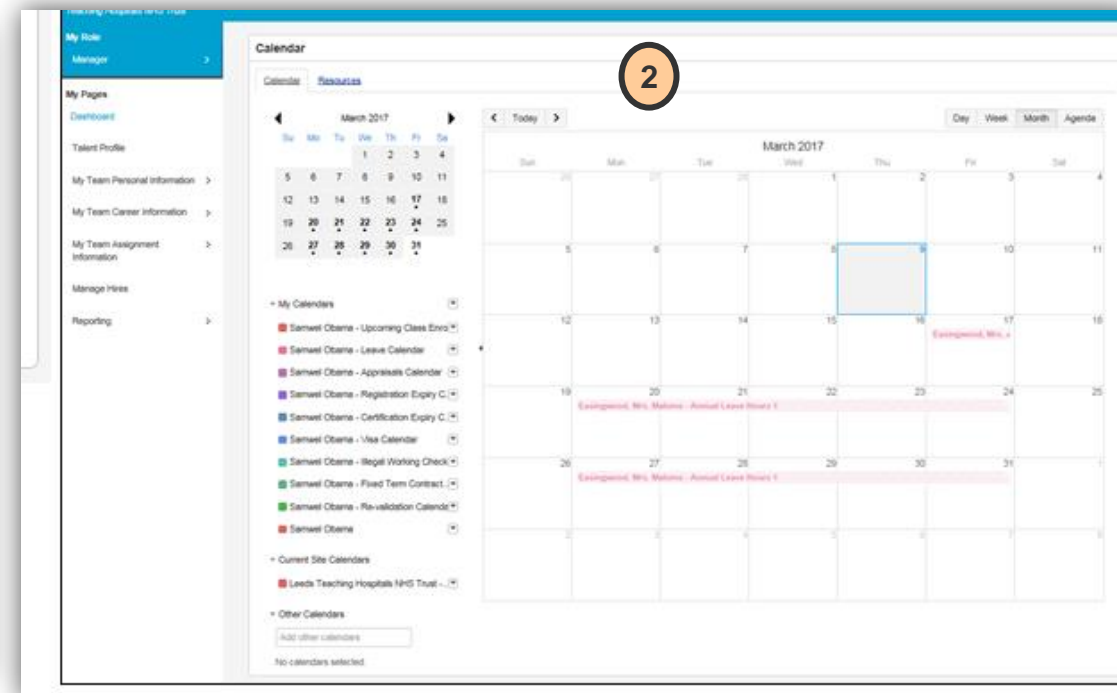
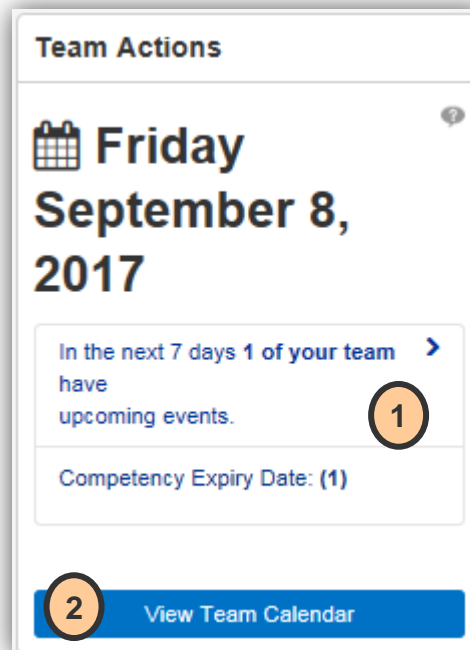
- 1 Clicking on the Launch Organisation Chart button takes the manger into the visual chart.
- 2 Clicking on any of the employee nodes will display an action menu, where the manager can access normal ESR functionality.

Team Actions

The Team Actions portlets, gives the manager direct access to their teams ESR diary events.

The events are:-

- Class Enrolments
- Absence
- Appraisal Due Date
- Registration Expiry Date
- Learning Certification Expiry Date
- Visa Expiry Date
- Valid Illegal Working Checklist
- Fixed Term Contract End Date
- Competency Expiry Dates
- Increment End Dates

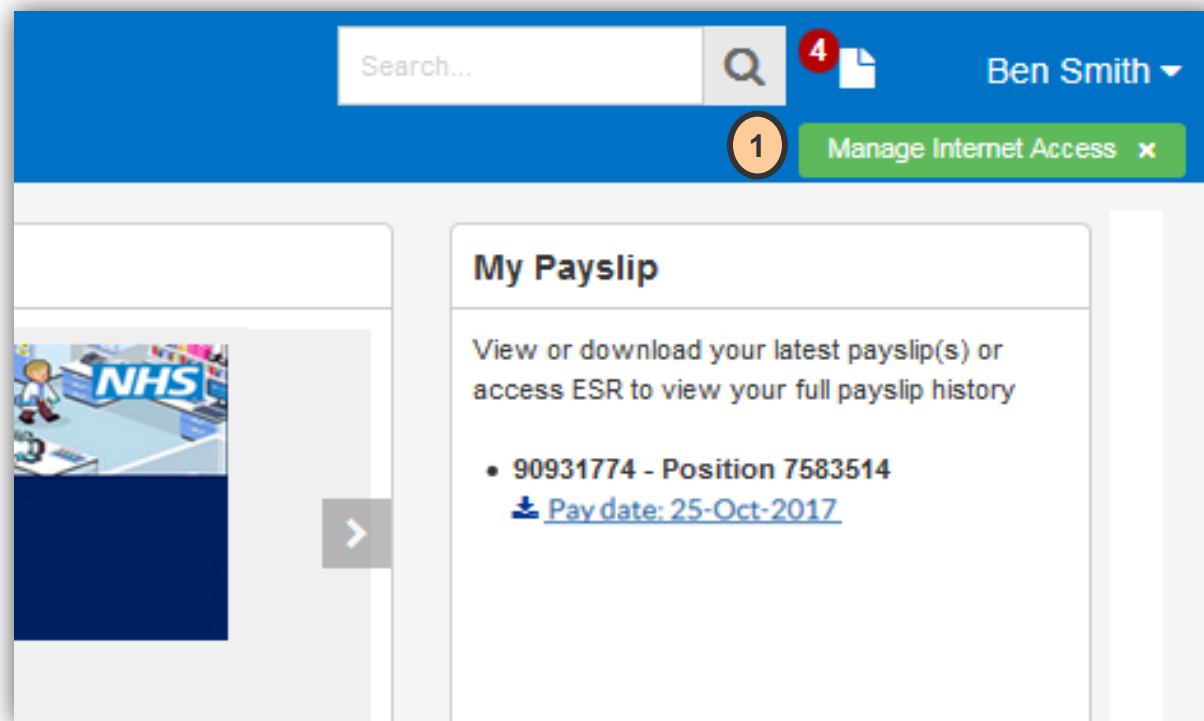


- 1 The **Team Actions** portlet will give a quick view of the next seven days events for the managers staff.
- 2 By clicking on the View Team Calendar, the manger can view more than one employees calendar at once.

Manager Internet Access

Managers have the ability to access ESR from a non-N3 network in the same way employees can.

This gives them access to BI Reports and ESR Manager functionality via a mobile device.



A manager is required to request manager access initially from a work machine. (ie via N3). ¹
A mobile number will have to be entered to enable an access code to be sent every time a manager wants to access the manager dashboard. **Similar to on-line banking access codes.**

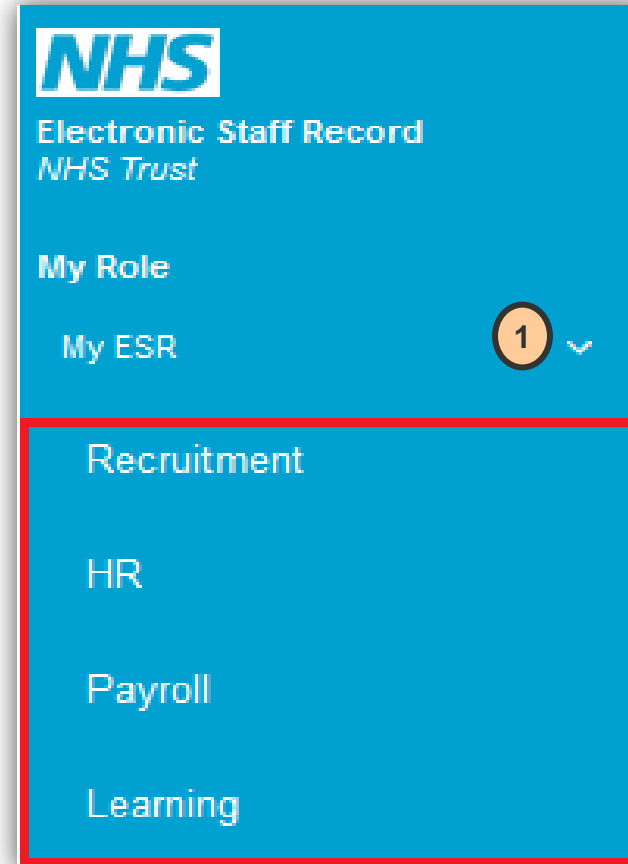
Professional Users Dashboard



Professional Dashboards

In addition to the Managers Dashboard, there are further Dashboards available for Core Users:

- Recruitment
- HR
- Payroll
- Learning



The Professional Dashboard can be accessed by those who have the relevant URP assigned to them.

① These are accessed by clicking the down arrow next to My ESR in the Navigation Pane

Recruitment Dashboard

The Recruitment dashboard allows the user to easily monitor and track the progress of applicants



The three current portlets are connected to BI reports which can present further detailed information when clicked on.

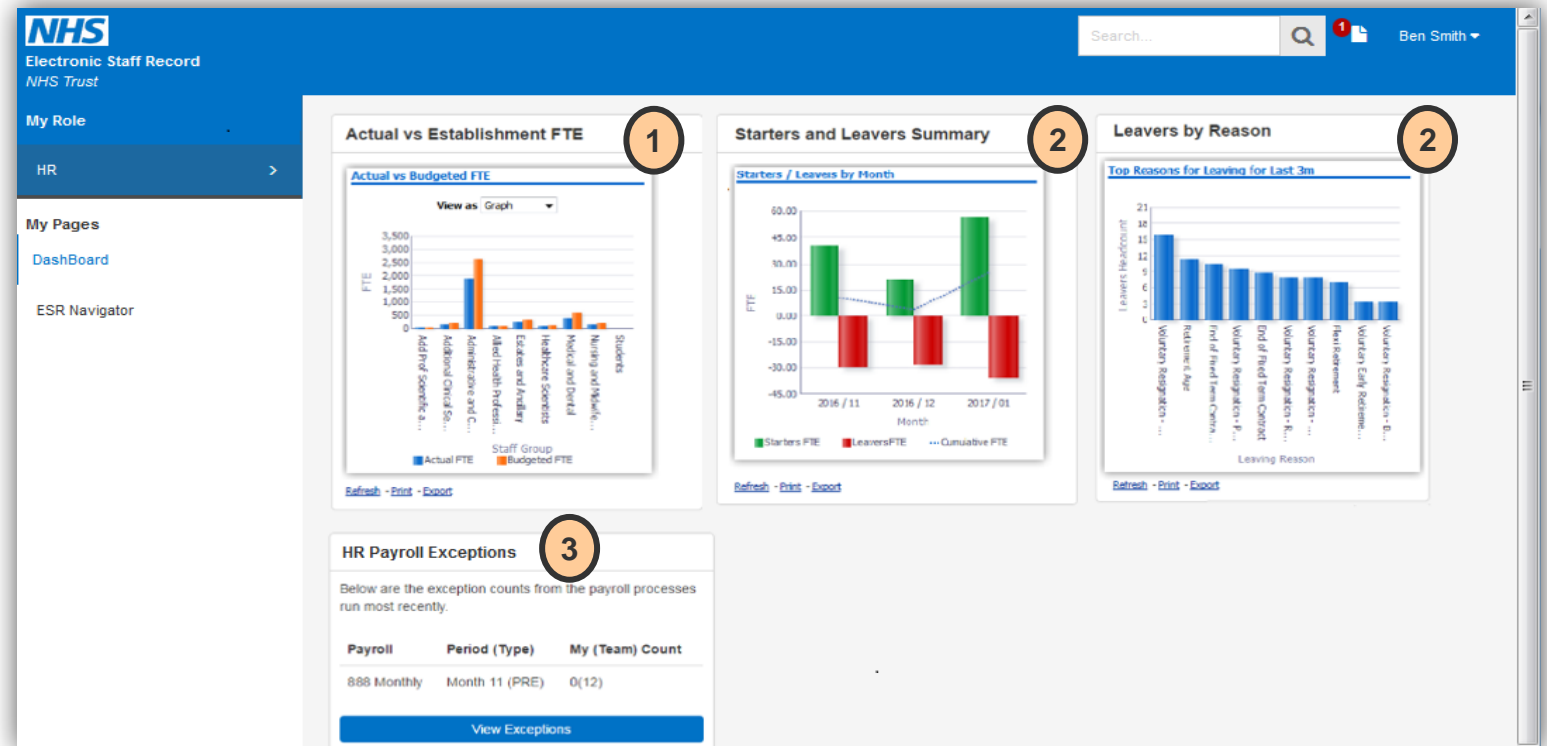
They are :- **1 Applicant Summary** **2 Applicant Management** **3 Open Vacancies**

This Dashboard assists monitoring recruitment processes, identifying any delays and giving the user an overall picture of the time from advert to hire.

HR Dashboard

The HR Dashboard allows quick access to BI reports on Establishment, Starters & Leavers and Leavers Reasons.

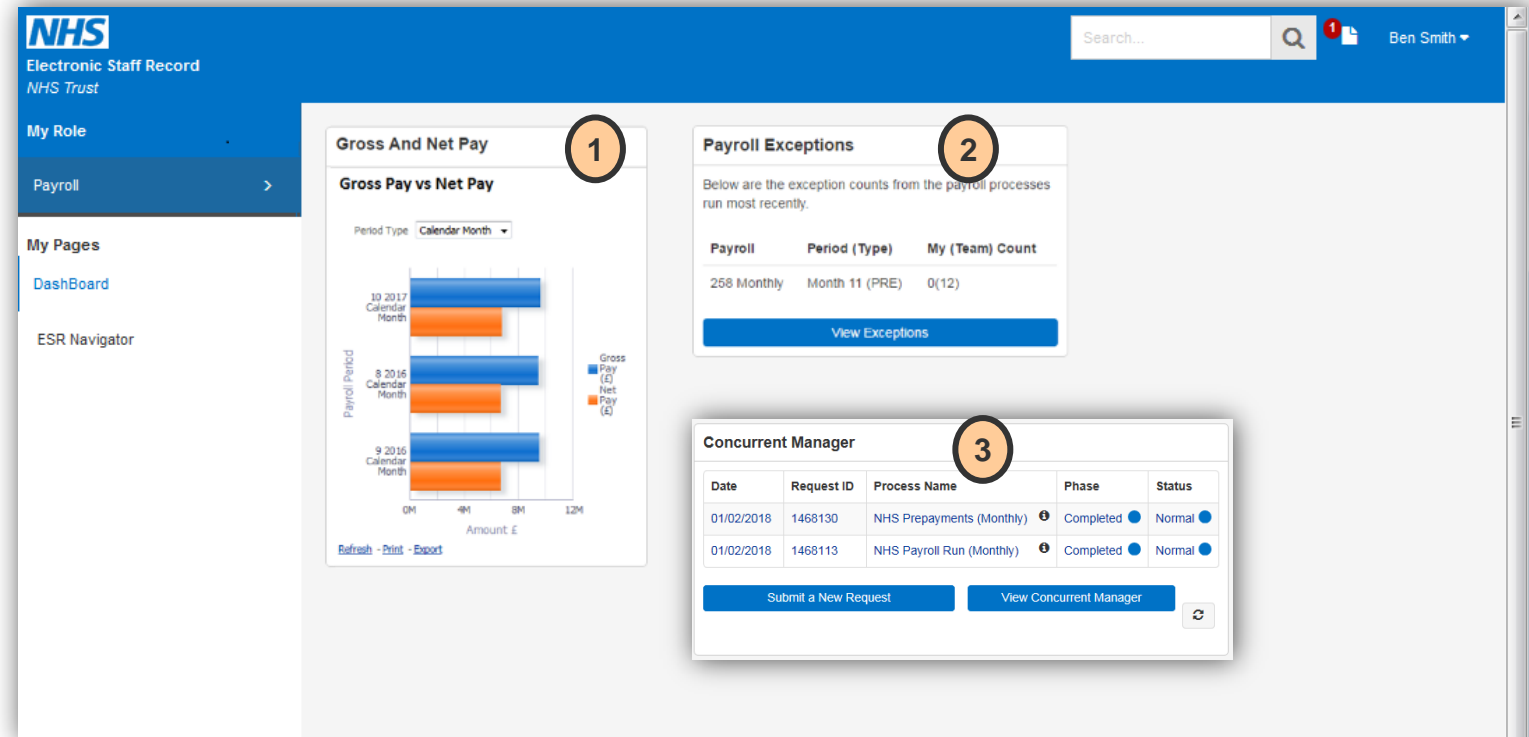
All the graphs are clickable and take you to the relevant BI report and data.



- 1 **Actual vs Establishment FTE** encourages the use and management of Establishment Control.
- 2 **Starters and Leavers** and **Leavers by Reason** can both aid Recruitment in understanding recruitment and retention trends.
- 3 **HR Payroll Exceptions** shows any exceptions that have been assigned to the HR users, allowing them to quickly identify and manage any issues.

Payroll Dashboard

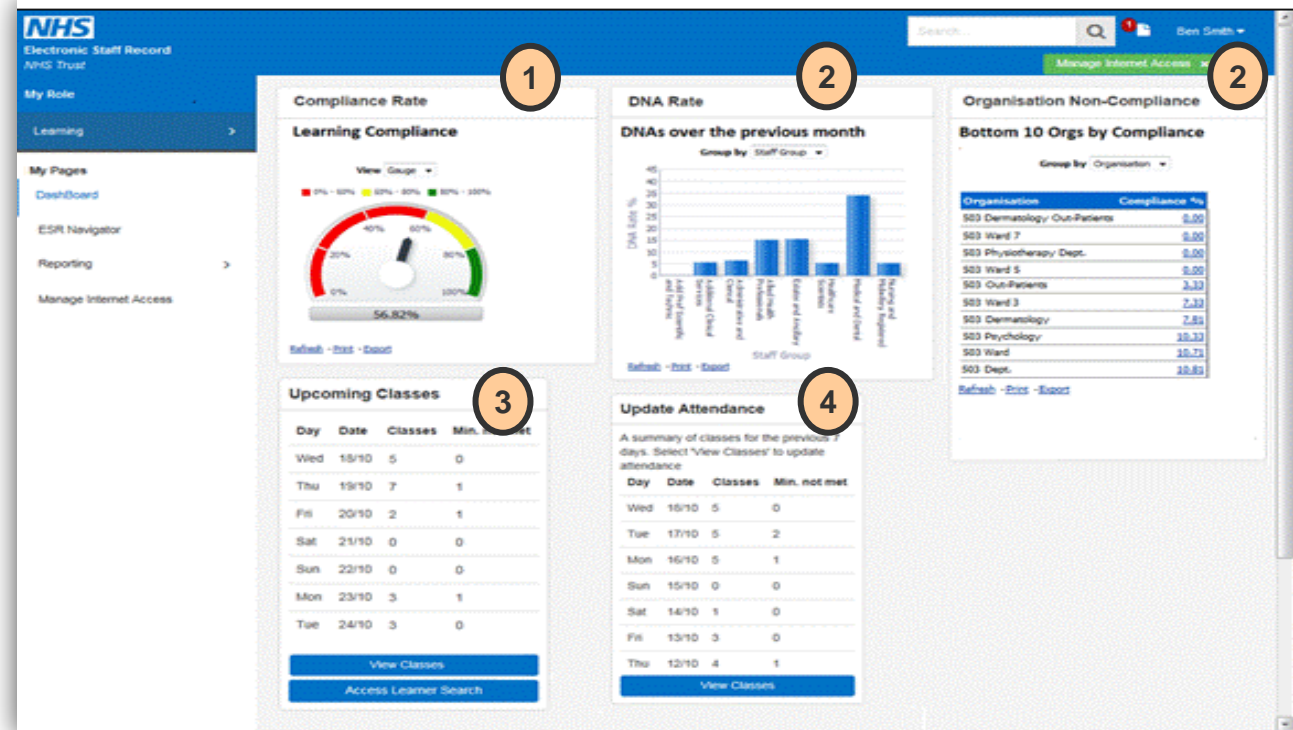
The Payroll Dashboard allows the user to quickly identify and manage any payroll exceptions.



- 1 The **Gross Pay vs Net Pay** portlet gives access to a BI report with further data.
- 2 **Payroll Exceptions** show the Exceptions that have been assigned to the user and the team, and can launch the exceptions management tool in one click.
- 3 The **Concurrent Manager portlet** shows where a process has failed or completed with warnings/errors. The portlet will provide information relating to the following process:- *Payroll Run (Monthly), Prepayments, RTI Prepayments & FPS Process , Retro Pay , RTI FPS EDI Process 2017/18*

Learning Dashboard

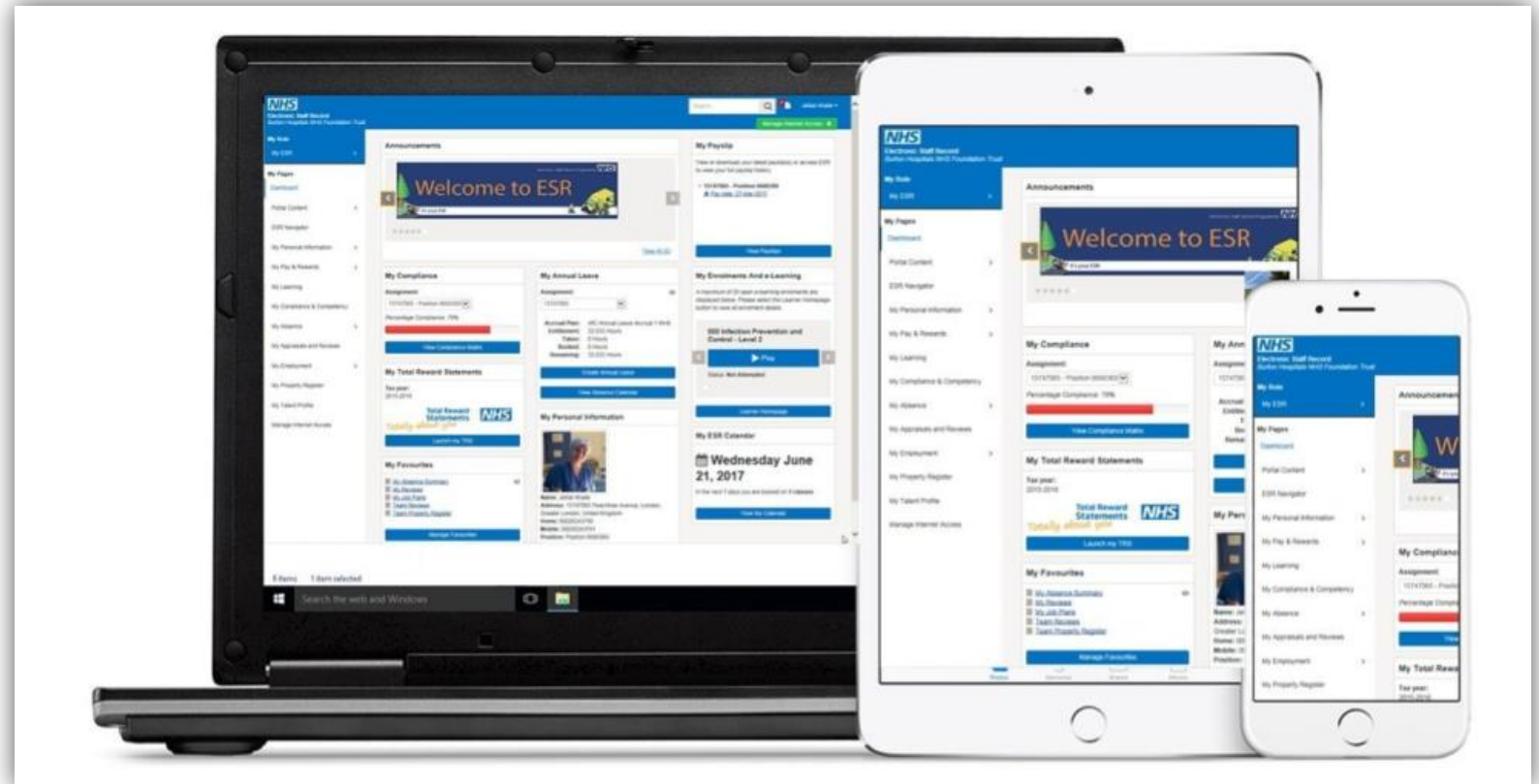
Having at a glance information available on the Learning Dashboard, easily identify areas of concern and empowers users to take proactive action promptly.



- 1** The **Learning Compliance** portlet shows the compliance percentage for the entire organisation. By clicking on the gauge you enter into BI where different organisation levels can be integrated.
- 2** **DNA rate** allows quick identification of any areas of concern, as does the **Bottom Orgs by Compliance**.
- 3** The **Upcoming Classes** Portlet allows the user to identify classes that have remaining spaces easily.
- 4** Learner's status can be quickly updated using the **Update Attendance** Portlet, ensuring their Learning Record remains up to date.

ESR BI is accessible on different platforms

ESR BI can be enabled so that it becomes accessible outside of the N3 network, allowing users to access reports from home or mobile devices



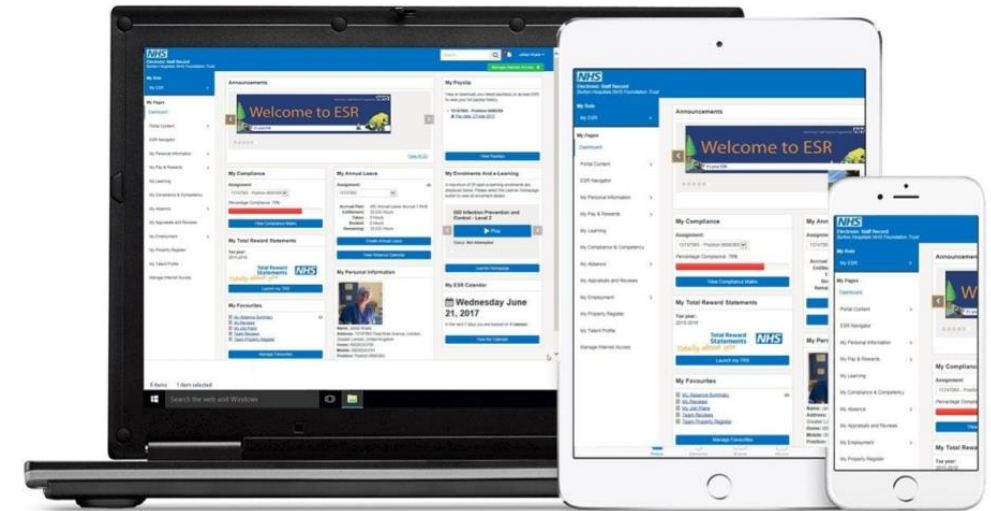
Learning Admin, Class Admin and Learning Instructor URPs can also be set up for access via Username & Password, and so allowing them to access these URPs on a mobile device – ideal for real time updates of class attendance.

Benefits to the organisation



As well as the benefits for individuals, effective use of the Portal can benefit the whole organisation.

- The Announcement Portlet functionality can be used as internal Communications and Engagement method. It can be used as a 'nudge' to encourage employees to view information or undertake tasks
- The Twitter Portlet can be configured with your organisation's Twitter feed, which appears to the user in real time
- Links to other web-based systems and internet links can be added by the organisation
- Documents can be uploaded to the Portal by your organisation
- Portlets can be removed or moved around at any time by your organisation

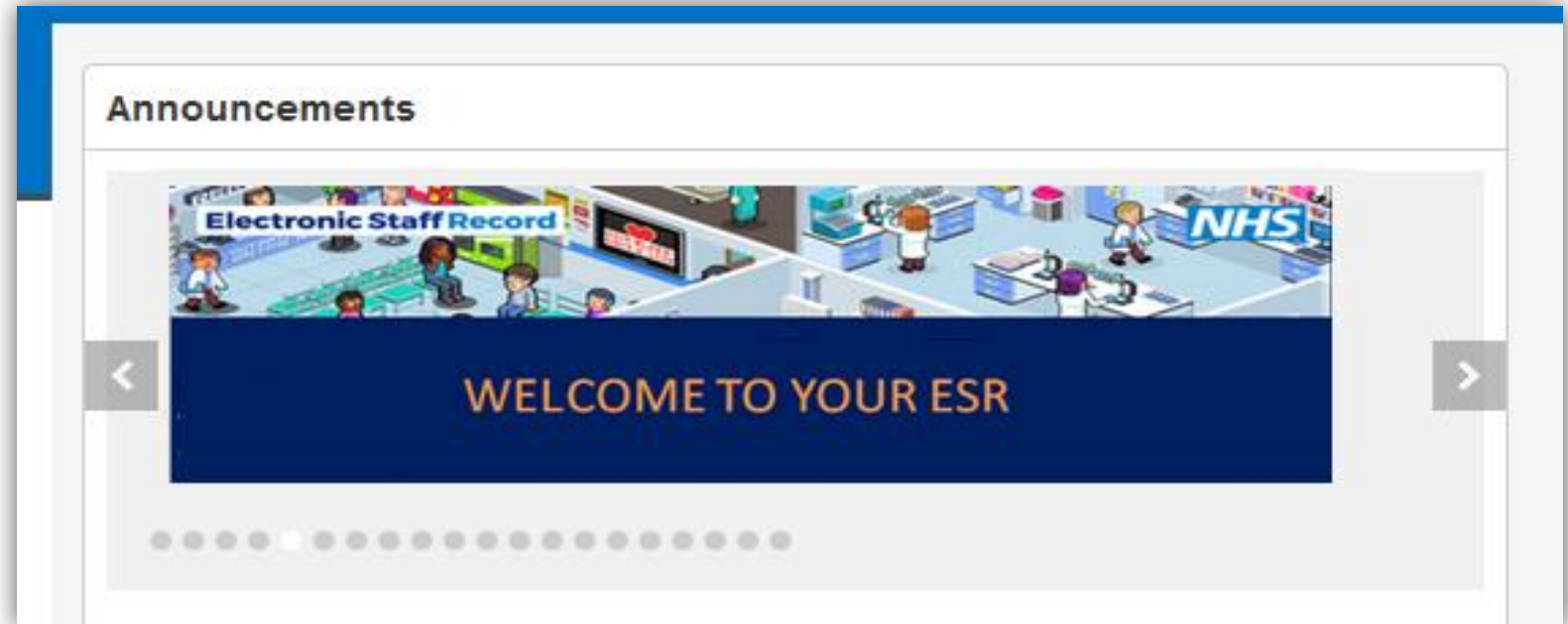


Announcements

As well as National Announcements, local announcements can be created by the organisation.

The flexibility of the functionality allows them to be scheduled.

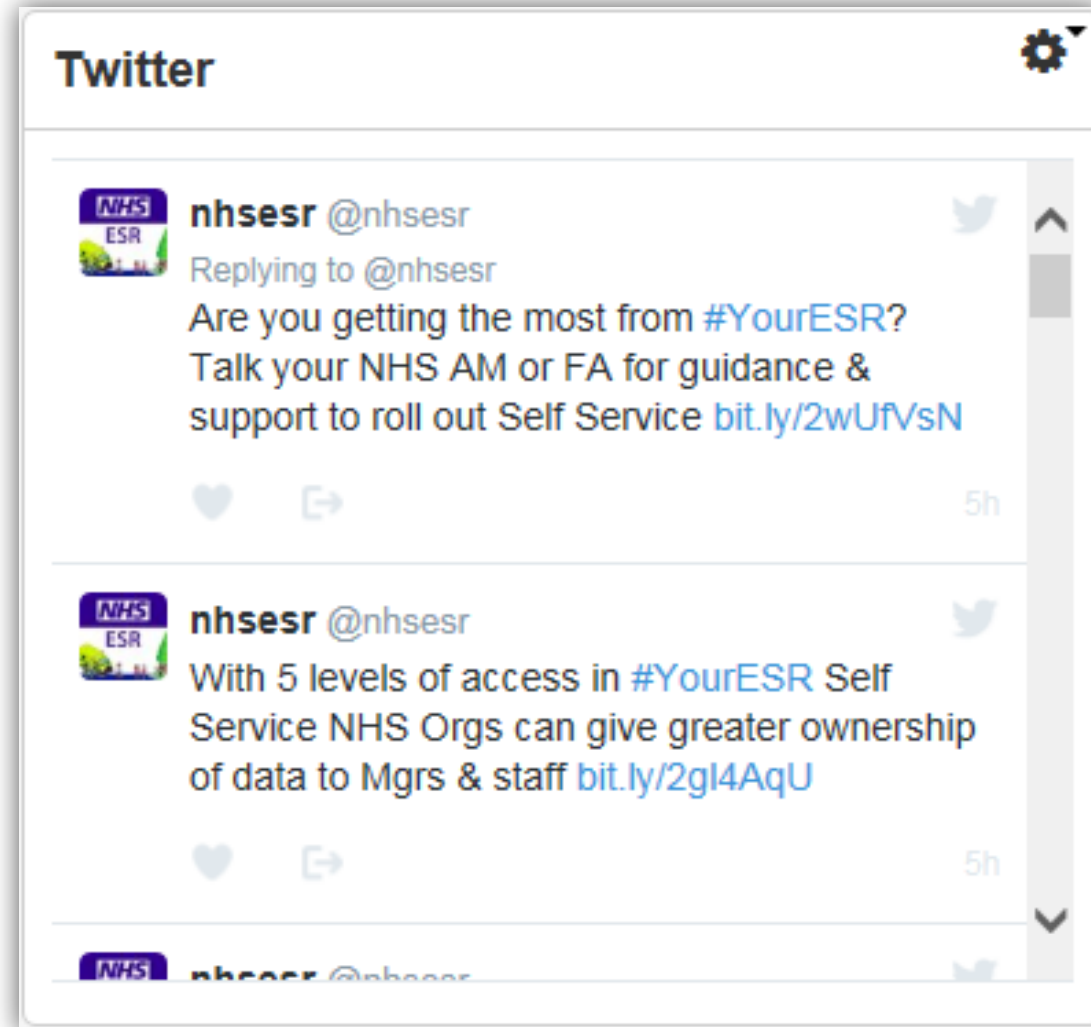
Announcements can contain hyperlinks to other websites or local intranet sites as well as pictures.



Twitter

The Twitter Portlet can be configured with your organisation's Twitter feed, which appears to the user in real time.

This allows tweets that are posted by your organisation on Twitter to be pushed to a wider audience who may not see them otherwise.



Local Links

Using the Local Links Portlet allows organisations to transform Self Service into a one-stop shop, where employees can find everything they need to do their jobs.

This can help embed Self Service within your organisation, and improves the employee experience.

Local Links



[ESR Website](#)

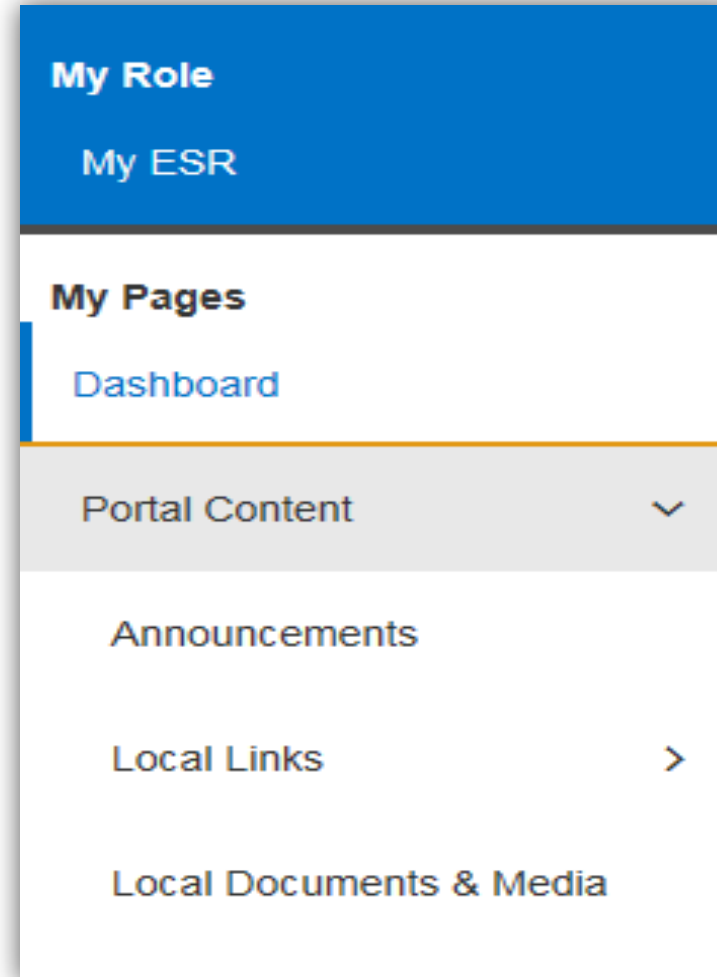
[NHS Choices](#)

[NHS Employers](#)

Local Documents and Media

Documents can be uploaded to the Portal by your organisation - some examples could be:

- New HR policies
- Payslip Leaflets
- Organisation Site Maps

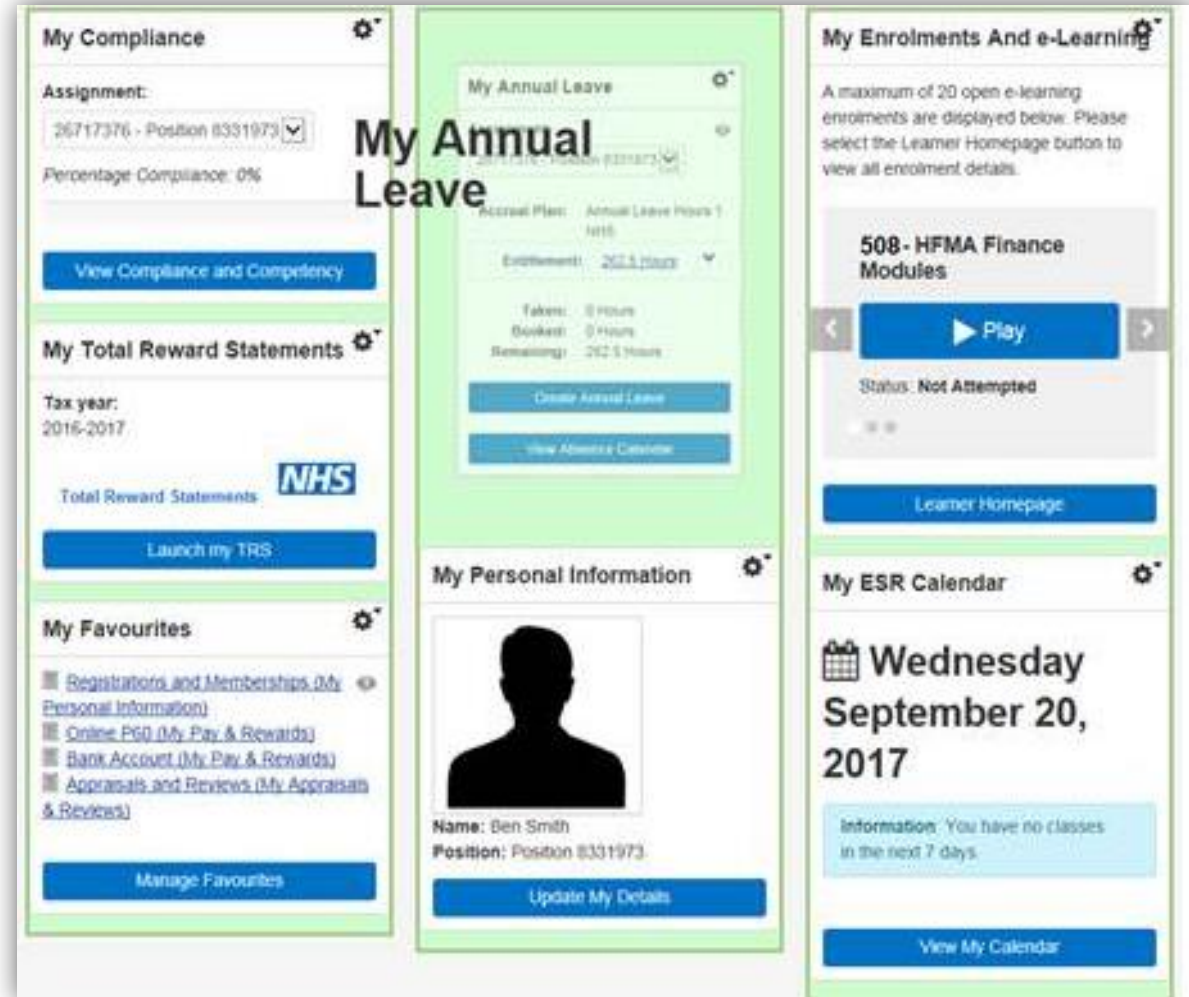


Layout Changes

Portlets can be removed or moved around at any time by your organisation.

This allows you to promote certain initiatives or tasks – eg the TRS Portlet could be moved to a more prominent position when the new statements become available

Portal Administration View



The screenshot displays the 'Portal Administration View' of the NHS Electronic Staff Record Programme. The interface is organized into several portlets, each with a settings gear icon in the top right corner:

- My Compliance:** Shows an assignment dropdown set to '26717376 - Position 8331973' and a 'Percentage Compliance' of 0%. A blue button labeled 'View Compliance and Competency' is present.
- My Annual Leave:** Features a large title, an 'Accrual Plan' dropdown set to 'Annual Leave Hours 1 J015', an 'Entitlement' dropdown set to '202.5 hours', and buttons for 'Taken: 0 hours', 'Booked: 0 hours', 'Remaining: 202.5 hours', 'Create Annual Leave', and 'View Absence Calendar'.
- My Total Reward Statements:** Displays the 'Tax year' as '2016-2017' and a 'Total Reward Statements' section with the NHS logo and a 'Launch my TRS' button.
- My Favourites:** Lists links for 'Registrations and Memberships (My Personal Information)', 'Online P60 (My Pay & Rewards)', 'Bank Account (My Pay & Rewards)', and 'Appraisals and Reviews (My Appraisal & Reviews)', with a 'Manage Favourites' button at the bottom.
- My Personal Information:** Includes a silhouette profile picture, the name 'Ben Smith', the position 'Position 8331973', and an 'Update My Details' button.
- My Enrolments And e-Learning:** States 'A maximum of 20 open e-learning enrolments are displayed below. Please select the Learner Homepage button to view all enrolment details.' It features a section for '508 - HFMA Finance Modules' with a 'Play' button and 'Status: Not Attempted', and a 'Learner Homepage' button.
- My ESR Calendar:** Shows the date 'Wednesday September 20, 2017' and an information box stating 'You have no classes in the next 7 days', with a 'View My Calendar' button.

Our Portal

Nottinghamshire Healthcare NHST





Portal Rollout

Cath Wright
Head of Employment Services



About our Trust

- Mental Health & Community Trust
- Headcount of 8775
- Covering over 100 sites
- Inpatient, Community and Prison Healthcare
- Employee, Supervisor and Manager Self Service
- Pilot site for new portal



Implementation

- Switch over Jan 17 – limited users
- Wider availability across the trust Feb 17
- Challenges around IT specifications within trust – constraints due to clinical system requirements
- Worked closely with HIS to resolve where possible
- Restricted access to Portal only in November 17
- 83% of staff accessed using portal March 18 (last 90 days)



User access via Portal

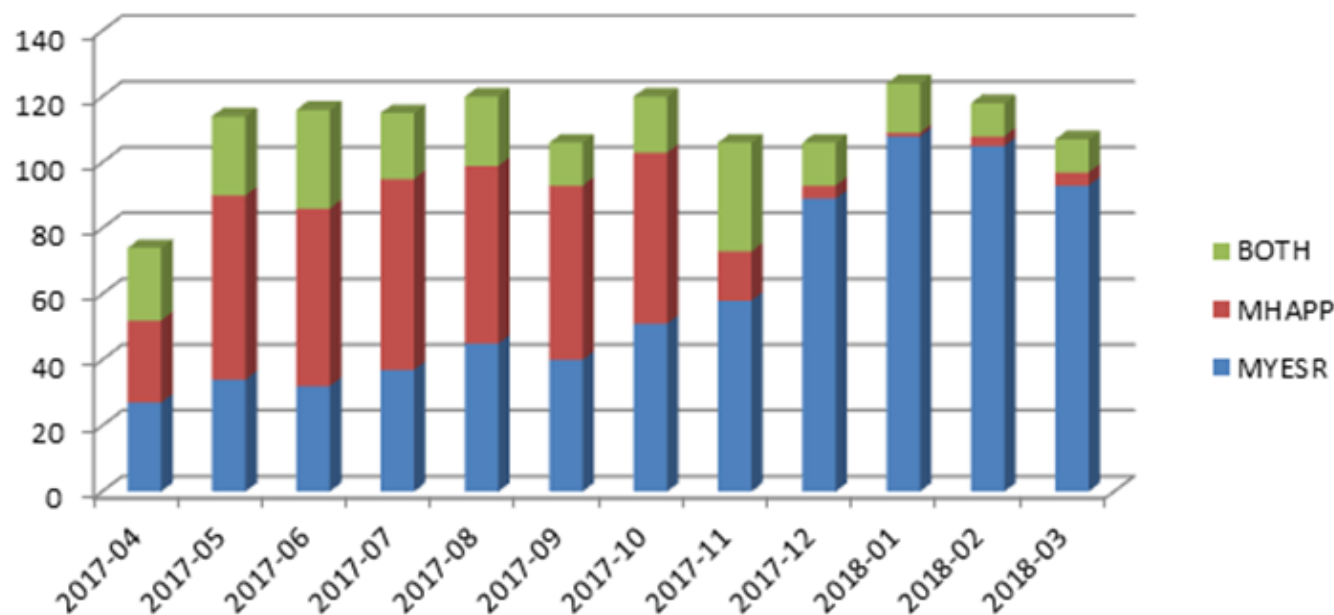
Nottinghamshire Healthcare

NHS Trust

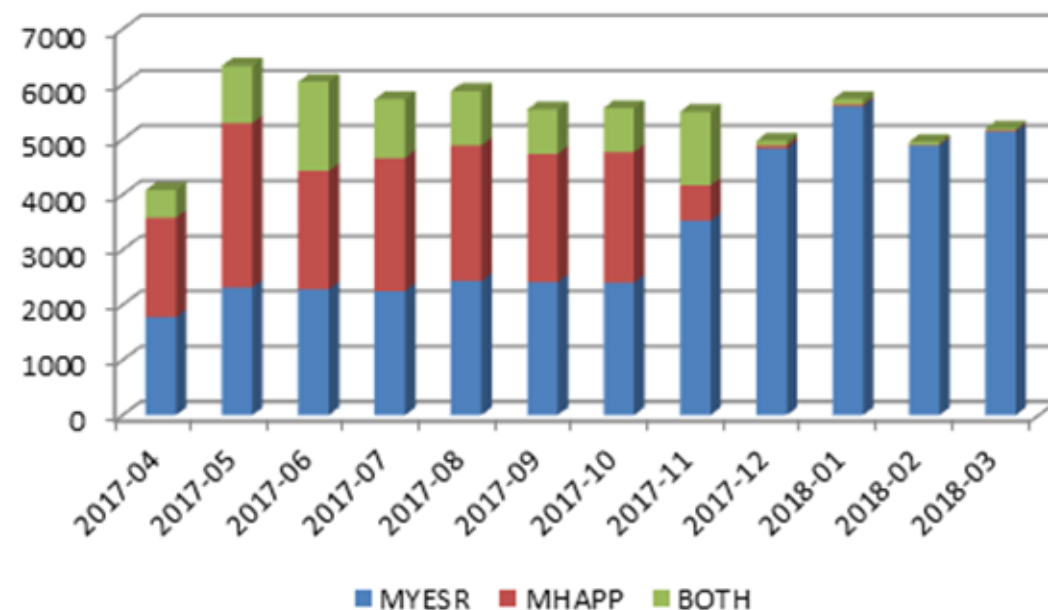


Positive about integrated healthcare

Professional Users



Self Service Users



- Only 4 accessed ESR via mahpp in March
- 93 accessed via the portal

- Only 22 accessed ESR via mahpp in March



Portal

- All Portlets are visible although slight change to position
- Trust Twitter portlet on landing page
- Local Links
 - NHS Jobs
 - NHS Pensions Agency
 - Trust Internet site
 - E-Expenses



Portal

- Announcements – in addition to National announcements it is used locally for ESR and OLM/E-Learning information
 - Advises on changes to existing E-Learning
 - Reminders to undertake IG training
 - New TRS Statements available
 - Information about Local Links and how to find them
 - Details about the ESR App
 - Advance notification of ESR Surveys
 - Downtime notification



Portal

- Dashboards also available to
 - HR Users
 - Payroll Users
 - Recruitment
 - Learning
- Clear, easy to read and understand information for managers and core users



Portal - Benefits

- Increase usage of ESR Self Service
- Ability to plan the move to E-Payslips
- Visibility of information to employees/managers
- Improved data quality/information ownership
- Portals provide task specific information
- Clear communication using announcements
- Use of local links to make ESR the go to place
- Mobile access



Portal – next steps

- Move to electronic payslips only
- Increase the use of the portal
- Further communication around use of the portal on mobile technologies
- Working with users to further expand the use of the Portal and the dashboards for managers

Our Portal

Derbyshire Healthcare NHS FT

Ali Davies



Who are we

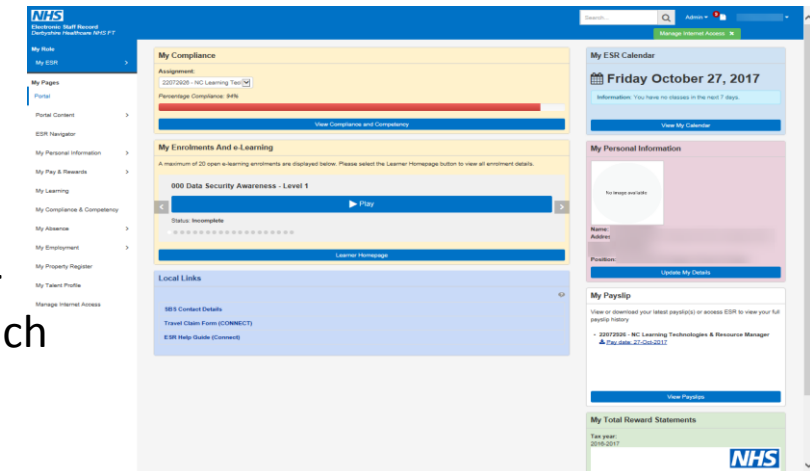
- 2500 staff across 80 locations throughout Derbyshire
- 2017/18 – nearly 40,000 eLearning completions, 25000 classroom spaces administered through ESR
- Just over 200 local competencies

Historically

- Significant issues with ESR prior to rollout
- No confidence in system
- 4000 manual eLearning updates required in 3 months

Roll Out

- Provisioned May 2017
- Launch
 - Icons, Screen Savers, Intranet Pages, Guides
 - Training Sessions – Teams / 1:1 - Over 1000 staff trained face to face – included sections we had not actively used in OLM prior to ESR relaunch



Reception

- Ease of use opinion grew from 24% on ESR v1 to 89% following ESRv2 Training
- Access from Non Trust Devices large success

New Uses within Trust

- Roll out of Class Administrator for all our Trainers and Subject Matter Experts using OLM Data Groups
 - Instant Access to class data
 - Learning Portal Page
- Manager Self Service for Training Compliance – live data, no hiding
- External Learning – Allowing for easy sign off of on job knowledge, alternative routes for competency compliance, prior learning
- Talent Profile – renamed by some as ‘My NHS CV’
 - Appraisals
 - Record of All Learning
 - Ease of access for external CPD reporting eg Pharmacists, Medics
- IT looking into use of Property Register to actively reduce costs of lost equipment as staff leave such as dictaphones, mobile phones, laptops, software licences

Our Portal

Provide
Kaiser Chowdhury



Move to the Portal

- Provisioned on 12th June 2017.
- For all users(approx. 1000).
- Staff communication through electronic noticeboard along with guidance to the ESR Portal.
- New ESR Access icon placed on user desktop profile.
- Kept IT onboard from prior to provisioning the Portal to FAQs on Service desk calls and support.

Portal Access route

- New ESR Portal access icons pushed to all user desktop profiles by IT.
- Old icons with access to the non-portal remained for 6 weeks along with the new icons on the user desktops for employees to settle and get used to.
- Old icons with access to the non-portal removed after 6 weeks from the provision date with prior communications through electronic noticeboard.

Portal Benefits

- Easier access to online payslips which also appear 2 days prior to the pay date. All previous payslip access available in one place at all time.
- E-Learning now integrated within the ESR Portal.
- The ESR Portal layout and contents are similar to the ESR mobile app.
- ESR Portal remote access availability gives more user exposure to their employee information at any time.
- ESR Portal allows quicker employee information update and paperless process.

Future plans in process

- Implement and enhance the use Manager Self Service.
- Use of Absence, logging sickness and leave's through the ESR Portal.
- Use of some assignment related Changes made my Managers through the ESR Portal.
- Configure effective and relevant BI portlets to Managers, Recruitment and Learning Management for routine usage.

User Feedbacks

- So much can be done so effectively.
- Very easy to access and all in one place.
- Having access to the online payslip is the way forward.
- What don't we do more through Self Service?

Portal Developments



Releases 2018

The schedule for 2018 release are as per the table.

Full details of the final enhancements will be included in the ESR Release Notice and/or Guide to Enhancements at the time of release.

Release date	Release
14 February 2018	Release 37.2.3.0 - deployed
1 March 2018	Release 37.3 - deployed
30 March 2018	Release 38 - deployed
7 April 2018	Release 38.1.1
28 April 2018	Release 38.2
25 May 2018	Release 38.3
29 June 2018	Release 39
28 September 2018	Release 40

The ESR Development Schedule includes details of planned developments to the ESR solution.

The information in this schedule is subject to change and any deployment will be subject to successful development and final testing. The schedule for changes is laid out below (subject to the constraints noted above). Full details of the final enhancements will be included in the ESR Release Notice and/or Guide to Enhancements at the time of release.

CCN088 – Login page update

The additional information for smart card users displayed on the log in page will be removed.

The log in page will display to fit onto the screen and will show both log in routes (user name/password and smart card) without the need to scroll.

CCN095 - My Personal Information portlet to include collapsible region

The My Personal Information portlet will be updated to enable the user to select to collapse the information in the portlet so this is not visible when landing on My ESR portal.

The collapsible region will encompass address, home phone, mobile phone, and position, meaning that only photograph and name are displayed. Where no photograph is associated with the user, the portlet will resize accordingly.

CCN092 – Show required only e-Learning in My Enrolments Portlet

A check box will be added to the learning portlet to enable only mandatory learning to be displayed.

CCN093 – Update to Payslip Portlet to include link to P60 and ability to opt out of Paper Payslips

My Payslip portlet will be updated to include view of P60, so will be renamed My Payslip and P60. The ability for a user to opt out of paper payslips will also be provided in the portlet.

CCN097 – Password management changes

The following changes will be made to assist with user password management:

1. The password policy rules page will be added to the password create and reset pages, and in account management general preferences.
2. The link on the log in page will be amended from Forgotten Username and Password to Forgotten | Request Username/Password | Unlock Account.
3. The ability for an organisation to set an automatic internet access option at VPD level will be provided. This will be a new trust level setting, which will not be set by default and will require an organisation to choose to set it. This will only work where there is no smart card requirement for ESS, ESSLA, and External Learner URPs. It will work in conjunction with the existing Auto User Account creation process.

Next steps for organisations

Key Priorities and Mhapp removal timescale



Key Messages

Letter from **Paul Spooner** to HRDs 13th March 2018 – A copy to ESR Leads.

The withdrawal of the non-portal URL will take place **no later than 30 September 2018**.

UN2514 – 29th November 2017

From 1st December 2017, all users logging in via non Portal URLs

are presented with an option to continue to access ESR via this route, or via the new Portal.

Key Actions

- Ensure Portal is configured for Self Service and Professional Users.
- If you are experiencing Portal issues, raise an SR and ensure that you respond to them.
- Remove mhapp URLs from desktop icons, intranet links etc.
- Provide relevant learning / guides for end users regarding the change.
- Communicate and publicise the change to ensure all users are aware.

Summary

- The new ESR Portal is the gateway into ESR for all NHS employees and managers.
- From the Portal employees can quickly and easily access a range of Portlets that display information that is important to them, whether they are a busy nurse, doctor, manager responsible for a team or a core ESR user (e.g. Payroll or HR activities).
- The portal dashboards are a valuable resources for professional users.
- The portal is continually developing to help and support employees, managers and the organisation, ensure you keep up to date with progress

Support

- Contact your regional ESR Functional Adviser or Account Manager <https://www.electronicstaffrecord.nhs.uk/nhs-esr-team-directory/>
- Portal User Guides <http://www.esr-education.online/>
- Known Error Log
- Raise an SR
- Special Interest Groups – ESR provides an update at all meetings

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@nhsesr – please follow us!

@SR_Finney





Electronic Staff Record Programme



Thank you