Maximising the ESR Portal

24th April 2018

Matt Swindells
ESR Account Manager (Kent, Surrey, Sussex & Wessex)

Helen Casey
ESR Functional Advisor (Kent, Surrey, Sussex, Wessex & South London)
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: Sussex Community NHS FT & Surrey & Borders Partnership NHS FT
- Portal Developments
- Next steps for organisations
- Summary & Support
ESR Portal Statistics
March 2018

- **Welcome to the ESR Portal**

- **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
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
March 2018

Access Points for Payslips - Total Views

Payslip Portlet
Payslip- Non Portlet my.esr
Payslip- Non Portlet MHAPP

2017-08  2017-09  2017-10  2017-11  2017-12  2018-01  2018-02  2018-03
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
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** 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 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.
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** 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.
**Employee Self Service**

**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.
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.
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.
Manager Self Service
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.

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.
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.
Manager Self Service

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.

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.
Manager Self Service

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.
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 manager 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.
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 manager can view more than one employees calendar at once.
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. (i.e. via N3). 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 Users Dashboard

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.

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.
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.
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.
Benefits to the 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.
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 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

Benefits to the Organisation
Portlets can be removed or moved around at any time by your organisation.

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

Benefits to the Organisation
Our Portal

Sussex Community NHS FT
Surrey & Borders Partnership NHS FT
Sussex Community NHS FT – ESR Self-Service

Make it easy to log into ESR
• Make links prominent
  • Internet favourites
  • Desktop Icons
  • Link from Trust homepage
• Ensure all links are updated to my.esr.nhs.uk

Promote ESR wherever you can
• Trust Intranet
  • Front page
  • Dedicated page
• Staff Bulletins
• Attend meetings
• Induction and Training Days
• New Joiner packs
Keep promoting it regularly

Make sure you have your communications team fully on board – they will have great ideas on what staff want, the communication tools that reach the most people and are effective
The new ‘My ESR’ (Electronic Staff Record) has just launched – your one stop shop

Most staff used the old version of ESR just for e-learning but the new, improved ‘My ESR’ now enables you to:
• Review and edit your personal details held on your HR file.
• See payslips online up to two days in advance (both substantive and bank work) – and some records go back further than 2011!
• Opt out of printed payslips being sent to your home – save the environment and Sussex Community 43p per payslip sent in the post.
• Link to useful pay related websites such as eExpenses
• Access e-learning.
• Access your training record.
• See your latest annual Total Reward Statement.
• Interact with our Sussex Community Twitter site.
• Download the ‘My ESR’ app allowing you to access on the go 24/7.

How to access?
• Login with your old ESR details – you’ll be taken to the brand new, user friendly dashboard.
• If you haven’t used ESR before or have forgotten your login details click here and then click on Forgotten Username and Password.

For further information see our new ESR section on the Pulse.
Customise your Portal Dashboard

• Make sure local links go to pages that can be accessed anywhere
• Try and make ESR a ‘one stop shop’
• Take out portlets that relate to functionality you don’t use such as annual leave or training compliance

Support

• If you don’t have the time to produce user guides for everything link to national resources www.roadmappeducation.online
• Think about who staff currently contact when they get stuck - make sure they are confident self-service users and know who to direct staff to depending on the issue. Staff won’t change their habits!
• Make sure these people are in your ESR User Group
Access to OLM through the portal

Compliance status

Ability to access through mobile devices

Access by managers to updated reports

Various reports available through the Learning URP;

Effective reporting control and update;
The new portal has helped our organisation to:

- Plan ahead through status and predictive reporting
- Increase and maintain high levels of compliance through easy access to online training
- Decrease costs due to online training portfolio
- Decrease of time and resources necessary due to “mass/multiple” class creation
- Constant support from IBM
Portal Developments
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.

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.
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.
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
Next Steps – Mhapp Removal

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/](https://www.electronicstaffrecord.nhs.uk/nhs-esr-team-directory/)
- Known Error Log
- Raise an SR
- Special Interest Groups – ESR provides an update at all meetings
Questions
Thank you

Helen Pope
Sussex Community NHS FT
H.Pope@nhs.net

Nelson Boto
Surrey & Borders Partnership NHS FT
Nelson.Boto@nhs.net

Matt Swindells
ESR Account Manager
Matt.Swindells@nhs.net
07854 254938

Helen Casey
ESR Functional Advisor
Helen.Casey@nhs.net

@nhsesr – follow us