ESR Programme Update

North West BIG SIG

Tuesday 20th June 2017

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ESR Functional Advisor

North West & Wales

Electronic Staff Record Programme

NHS

- ESR statistics
- Operational information
- National forums
- ESR Programme update

ESR Utilisation: Self Service

ESR users without access to ESS or ESSLA URPs – April 2017

Country/Region	Users	Without ESS or ESSLA	Percent Without
East Midlands	85992	6040	7.0%
East of England	131073	49697	37.9%
Kent Surrey Sussex	106558	29856	28.0%
North Central and East London	93972	10106	10.8%
North East	80105	13861	17.3%
North West	217188	32540	15.0%
North West London	62418	7691	12.3%
South London	80711	11182	13.9%
South West	112865	20665	18.3%
Special Health Authorities	41020	3236	7.9%
Thames Valley	48369	12495	25.8%
Wales	98168	1301	1.3%
Wessex	55221	10885	19.7%
West Midlands	147382	25049	17.0%
Yorkshire and Humber	152875	33978	22.2%
Grand Total	**1513917**	**268582**	**17.7%**

% of Employees with No Paper Payslip
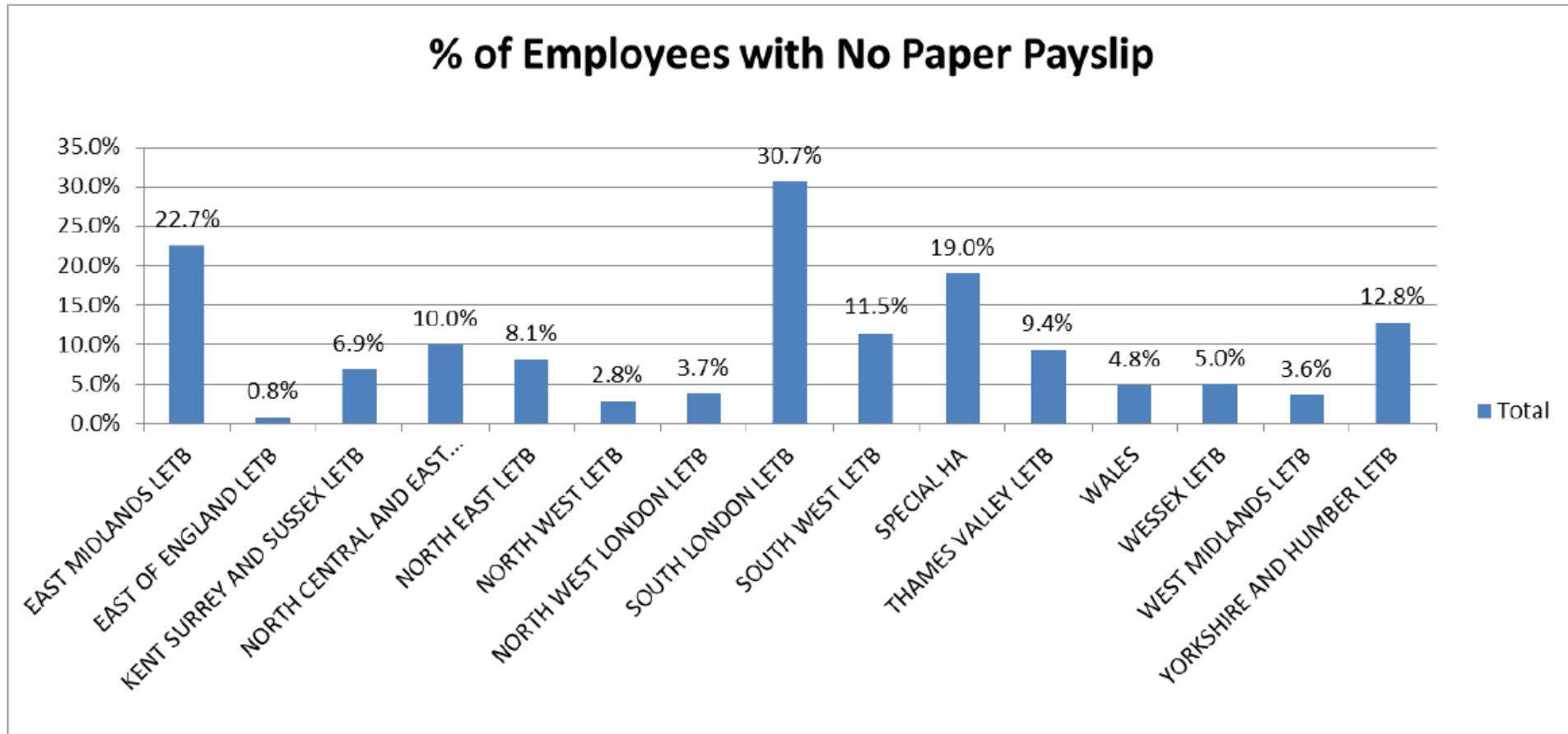
April 2017 – 9.7% of employees opted out of paper payslip across ESR

Top 20 Organisations - e-Learning completions in April 2017

1	NORTH EAST LETB	THE NEWCASTLE UPON TYNE HOSPITALS NHS FOUNDATION TRUST	10,121
2	NORTH WEST LETB	NORTH CUMBRIA UNIVERSITY HOSPITALS NHS TRUST	7,955
3	THAMES VALLEY LETB	BUCKINGHAMSHIRE HEALTHCARE NHS TRUST	6,673
4	EAST MIDLANDS LETB	NOTTINGHAMSHIRE HEALTHCARE NHS FOUNDATION TRUST	5,839
5	NORTH CENTRAL AND EAST LONDON LETB	ROYAL FREE LONDON NHS FOUNDATION TRUST	5,426
6	EAST OF ENGLAND LETB	NORFOLK AND NORWICH UNIVERSITY HOSPITALS NHS FOUNDATION TRUST	4,617
7	WALES	ABERTAWE BRO MORGANNWG UNIVERSITY LHB	4,070
8	NORTH EAST LETB	CITY HOSPITALS SUNDERLAND NHS FOUNDATION TRUST	3,934
9	EAST MIDLANDS LETB	UNITED LINCOLNSHIRE HOSPITALS NHS TRUST	3,534
10	WALES	ANEURIN BEVAN UNIVERSITY LHB	3,438
11	NORTH WEST LETB	STOCKPORT NHS FOUNDATION TRUST	3,309
12	KENT SURREY AND SUSSEX LETB	EAST KENT HOSPITALS UNIVERSITY NHS FOUNDATION TRUST	3,302
13	WESSEX LETB	PORTSMOUTH HOSPITALS NHS TRUST	3,148
14	WEST MIDLANDS LETB	STAFFORDSHIRE AND STOKE ON TRENT PARTNERSHIP NHS TRUST	2,958
15	SOUTH WEST LETB	ROYAL DEVON AND EXETER NHS FOUNDATION TRUST	2,857
16	WALES	CWM TAF UNIVERSITY LHB	2,773
17	YORKSHIRE AND HUMBER LETB	CALDERDALE AND HUDDERSFIELD NHS FOUNDATION TRUST	2,683
18	NORTH WEST LETB	MERSEY CARE NHS FOUNDATION TRUST	2,626
19	NORTH EAST LETB	TEES ESK AND WEAR VALLEYS NHS FOUNDATION TRUST	2,589
20	EAST OF ENGLAND LETB	ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	2,472

Operational information

Release 34 – 31st March 2017. Full details in RN307

ESR

- ESR Portal
- Forgotten Username or Password

OLM

- New Competency Requirements
- Learning Auto Enrolment

SSHR

- Changes to Compliance and Competency
- Numerous Field Changes Across SSHR
- Quick Address Search (QAS) Enabled in SSHR
- Changes to Appraisals and PMP
- Internet Access to TRS via Employee Self Service

Release 34.2 – 28th April 2017. Full details in RN311

- Additional workflow notifications to email accounts

Release 34.3.0.0 – 25th May 2017. Full details in RN314

- Additional workflow notifications to email accounts
- Additional items in ESR BI

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Known Error Log

- The KEL is updated fortnightly and distributed via UN.

- Please check the KEL before raising an SR.

- The latest version can always be found on KBase and ESR Infopoint.

![NHS Electronic Staff Record Programme]

Recent KBase Updates

- ESR Portal v1.0.ppsx

- ESR Webinar - release 34 v1.0.ppsx

- ESR-NHS0152 - Occupation and Job Role Data Verifier v2.0.xlsx

- ESR-NHS0245 - Creating Standard Measures in ESR BI v2.pdf

- ESR-NHS0189 ESR Reports - Guide to Discoverer Reports v33.pdf

- ESR-NHS0191 ESR Reports - Guide to Standard (Non-Disco) Reports v33.pdf

- ESR-NHS0190 ESR Reports - Index v33.pdf

Operational information

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ESRBI support / resources

- HTML BI Guides on the ESR Support Site: http://www.esrsupport.co.uk/ESRBI/guide/

- Recordings of BI webinars on ESR Development Website **here** (Kbase login required). Subjects covered = Customising a National Dashboard, Absence Reporting, HR Reporting and Compliance Reporting.

- New ESRBI and Discoverer Comparison Matrix is available within ESRBI section of Kbase **here**. Lists all standard Discoverer reports and comparative dashboard/analysis available within ESRBI.

- Guides to ESRBI Dashboards updated on K**b**ase

- Sign up to BI updates by email by visiting the Introduction to BI dashboard within BI.

New National Stat/Mand Competencies

The following national NHS MAND competencies have been added to ESR at the request of the National OLM & Talent Management SIG (see UN2321, 6/4/17)

- Preventing Falls (1,2,3 Year refresher periods and No Renewal)
- Dementia Tier 1 (1,2,3 Year refresher periods)
- Dementia Tiers 2 & 3 (1,2,3 Year refresher periods and No Renewal)
- Mental Capacity Act Level 2 (3 year refresher period)
- Domestic Violence and Abuse Level 2 (3 year refresher period)
- Deprivation of Liberty Safeguards Level 2 (3 year refresher period)
- Autism Awareness Level 1 (No Renewal)

Updates to National eLearning Content

Prior stat/mand content end-date extended to 30 June 2017

Further details in UN2335 (May 2017)

New content for Motor Neurone Disease

Updated Stat/Mand content from eLfH – only assessments are mandatory. See UN for actions required on certifications

Further details in UN2317 (April 2017)
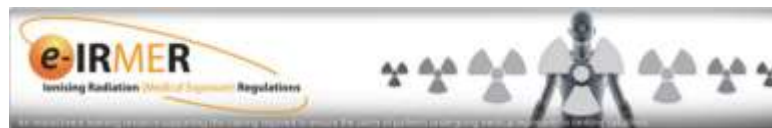
Further details in UN2301 (March 2017)

Enabling of non-JRE SCORM adapters within ESR (UN2449 & UN2450)

- A new suite of SCORM adapters to work with the e-Learning catalogue on ESR, removing the reliance on JRE software on a learner's device when playing their e-learning through ESR.

- Following national provider partners have updated their content servers to use the new non-JRE adapters:
  - ❑ HEE e-Learning for Healthcare
  - ❑ IT Skills Pathway
  - ❑ Skills for Health
  - ❑ Electronic Staff Record

- Working with the Southern e-Learning team to get the SCORM adapter functioning on their network.
- Organisations that use the Northern regional server or Repository, any local content will need the URLs updating on the Learning Objects to use the secure domain
- Content that remains on the non secure domain will continue to use the JRE SCORM adapter
- Courses which still require JRE are highlighted in the online e-Learning Catalogue.
- JRE for other aspects of ESR, such as access via a smartcard or users accessing Professional "core" ESR forms remains in place.

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Captivates on KBase…..reminder

HR Section
- SysAdmin - Workflow Administrator
- Medical and Dental Job Plans
- HR - Spot Salary
- HR - Secondment
- HR - Maternity KIT
- HR - IAT Initiator (Non Auto IAT)
- HR - IAT Approval (Non Auto IAT)
- HR - Career Break
- HR - Automated IAT
- HR - Employee Relations URP
- ESR - NMC Revalidation using Manager Self Service
- ESR - NMC Revalidation using Employee Self Service

Occupational Health
- Viewing OH Clearance Date in the Pre Employment Checklist
- Viewing and Recording OH Clearance Checks in ESR
- Submitting an OH Report

OLM
- OLM - Using the Learner Tab
- OLM - Tests
- OLM - Searching for Classes
- OLM - Qualifications
- OLM - Learning Paths.
- OLM - Learner Groups
- OLM - Learner Access
- OLM - Evaluations
- OLM - Enrol & Play e-Learning.
- OLM - Customers
- OLM - Creating Local e-Learning Content
- OLM - Creating Local Competencies
- OLM - Competence Requirements
- OLM - Certifications
- IAT - Competence Management
- Employee SSHR - Manage your Learning

Operational information

Captivates on KBase…..reminder

Self Service
- Self Service Basics
- Self Service HR Proxy Users

Employee Self Service
- Access via the Internet
- Managing Absence
- Managing your Competence Profile
- View your Employment Information
- Manage your Learning
- Manage Personal Information
- Registration and Memberships
- Add a Qualification
- Viewing your Total Reward Statement

Performance Management Plans
- PMP Administration Tasks
- Completion PMPs in Self Service

Manager Self Service
- Managing Absence
- Change Assignment Details
- Change an Employee's Hours
- Manage Employee's Competence Profile
- View Employment Information
- External Learning
- Hire an Applicant
- Manage an Employee's Learning
- Update Personal Information
- Property Register
- Add a Qualifications
- Registration and Memberships Details
- Suitability Matching by Person
- Suitability Matching by Job
- Terminating Employment and Assignments
- Completing Appraisals
- Agenda for Change - Development Reviews
- Talent Profile

Administrator Self Service
- Managing Absence
- Change Assignment Details
- Change an Employee's Hours
- Manage Employee's Competence Profile
- View Employment Information
- External Learning
- Hire an Applicant
- Manage an Employee's Learning
- Update Personal Information
- Property Register
- Add a Qualification
- Registration and Memberships Details
- Terminate Employment

National forms

Quarter 2 – 2017
(Development request submission deadline Friday 21 April 2017)

Thursday 30 March 2017	NSIG Chairs meeting	Sheffield
Tuesday 9 May 2017	Payroll and Pensions	Warwick
Wednesday 10 May 2017	Self Service HR	Warwick
Thursday 18 May 2017	HR and Recruitment	Sheffield
Thursday 25 May 2017	OLM	Sheffield

Quarter 3 – 2017
(Development request submission deadline Friday 21 July 2017)

Tuesday 27 June 2017	NSIG Chairs meeting	Sheffield
Tuesday 5 September 2017	Joint National SIG event/NSIG meetings	Sheffield

Quarter 4 – 2017
(Development request submission deadline Friday 20 October 2017)

Thursday 28 September 2017	NSIG Chairs meeting	Sheffield
Tuesday 7 November 2017	Payroll and Pensions	Warwick
Wednesday 8 November 2017	Self Service HR	Warwick
Wednesday 15 November 2017	HR and Recruitment	Sheffield
Thursday 16 November 2017	OLM	Sheffield

National SIGs information available on Kbase

Electronic Staff Record Programme

New
BJF

NHS ELECTRONIC STAFF RECORD

Business Justification Form for ESR Development Requests

Each section of this form must be completed FULLY prior to submission.

Section 1 – Administration

1.	Which National SIG is the request submitted to? (delete as appropriate)	HR and Recruitment Payroll and Pensions OLM Self Service HR
2.	Name of person raising the request:	
3.	Organisation of person raising the request:	
4.	Provide supporting SR number (Note – request cannot proceed without this):	
5.	If the request has been supported by a regional SIG, please attach a supporting statement from the RSIG Chair:	

Section 2 – Development Request

6. Describe the proposed change in detail:

Section 3 – Impact on Reporting

7. Does the proposed change have any impact on reporting?   YES/NO*
   (*delete as appropriate)

8. If yes, please describe the impact below:
   (Include names of reports requiring change, or details of format, parameters or data items if new report is required.)

Section 4 – Benefits case

Describe how the proposed change supports any national strategy or initiative. (Weight = 5)

Describe clearly the benefits that the proposed change will provide. (Weight = 4)

Describe how the proposed change would improve the usability of ESR and increase productivity, or efficiency and effectiveness. (Weight = 4)

Describe how the proposed change could increase the utilisation of ESR functionality. (Weight = 3)

Describe how you would promote this change to other ESR users, both in your own organisation, and in the wider NHS. (Weight = 3)

Please email the completed form to Julie Bickerton at julie.bickerton@nhs.net in line with submission deadlines.

ESR Development Website

- Ability to "star" requests and add comments for review by the NHS Development Team

- Download submitted BJFs

- Business Intelligence Section: Submit your own analysis

- Access Development Information: http://development.esr.nhs.uk

ESR App

The new ESR App provides a mobile gateway to
- My Employee Self Service – Quick links to the Internet Self Service portal / online Payslips / Absence calendar
- ESR News
- ESR Twitter feed
- Total Rewards Statement
- ESR Service Status –helps to reduce the number of local queries about ESR access issues;
- Push Notifications about planned ESR downtime and other helpful information

Plus additional functionality such as:
- Chat Function – A direct link to our helpful Support Team
- Useful Links to ESR resources
- App Survey – Take a couple of minutes to tell us what you think about the App

- We are cleansing our subscription database
- Please resubscribe here to continue receiving ESR News

Are you getting the most from your ESR?

➢ We will do an Assessment with you

➢ Give you clear feedback and recommendations – including quick wins

➢ Give you access to a new toolkit of resources and on-site support

So you can improve efficiency and reduce costs

Further information

For more information about ESR please visit:
- ESR Website http://www.electronicstaffrecord.nhs.uk/
- Development Website http://development.esr.nhs.uk
- kBase http://www.esr.nhs.uk/kbase
- ESR Infopoint https://www.infopoint.esr.nhs.uk

Subscribe to receive ESR News at:
- http://www.esrnews.nhs.uk/

Enter your e-mail address on the introduction dashboard to receive updates about ESR BI

Name

mike.winstanley@nhs.net Tel: 07824 5029

d.bromilow@nhs.net Tel: 07766161772

—

@nhsesr – please follow us!

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Thank you

It's your ESR

Manager Self Service From the Internet

- Release 32 September 2016 Employee Self Service via the Internet was introduced.

- Manager Self Service is the next step on the Road Map.

- For this to work for MSS an additional two-factor authentication is required.

- Currently access to N3 Network has two-factor authentication provided by Smart Card Access.

How it will work

To give Managers greater access, utilising two factors of authentication, in Release 35 we are introducing the ability for users to register a mobile phone number to which a one-time-passcode will be sent by text message.

- ➢ A manager wishing to access their Manager Self Service functionality over the internet will firstly log into ESR with their user name and password and be presented with their Employee Self Service information in the ESR Portal.
- ➢ From here they are able to "upgrade" their access to Manager Self Service by requesting a code that will be sent to their previously registered device.
- ➢ Once the code is entered Manager Self Service functionality will be available in the same way as it is over the N3 network.

At present internet access does not allow users to view and act on notifications, simply giving an indicator of any open notifications. From Release 35 we will open this capability up and allow full interaction to a specific set of Self Service based notifications, giving even more flexibility on managing both your own and your teams' records in ESR.

Points to Remember

- Only available via Portal
- Need to Request new code for each session(20 minute Grace period)
- Further Information on ESR Road Map Bulletin
- Guide to Enhancements

Common ID

- Currently Employees wishing to use ESS via Internet have to set up and manage a separate User Name and Password.

- Release 35 will change this approach and simplify to one user name and password.

ESS Users – Non Smart Card

- You will currently have two separate Username & two separate passwords. One full ESR and one internet.
- From 3rd July your separate internet username and password is no longer required.
- One single username and password will allow you to access ESR on the intranet and will also work as an alternative to Smart Card if accessing ESR on the NHS Network.
- Note: You will have a different ESR Login for each NHS organisation that you work in.

ESS Users – Smart Card

- You will have a separate username and password for your internet access.
- From 3rd July you will need to use your original ESR Username and not your separate internet username to access ESR.
- Your Internet Password does not change.
- You can see this username on the home page of your ESS access.
- One single username and password will allow you to access ESR on the intranet and will also work as an alternative to Smart Card if accessing ESR on the NHS Network.
- Note: You will have a different ESR Login for each NHS organisation that you work in.