ESR Programme Update

North West BIG SIG

September 2017

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Dave Bromilow – Functional Advisor NW & Wales
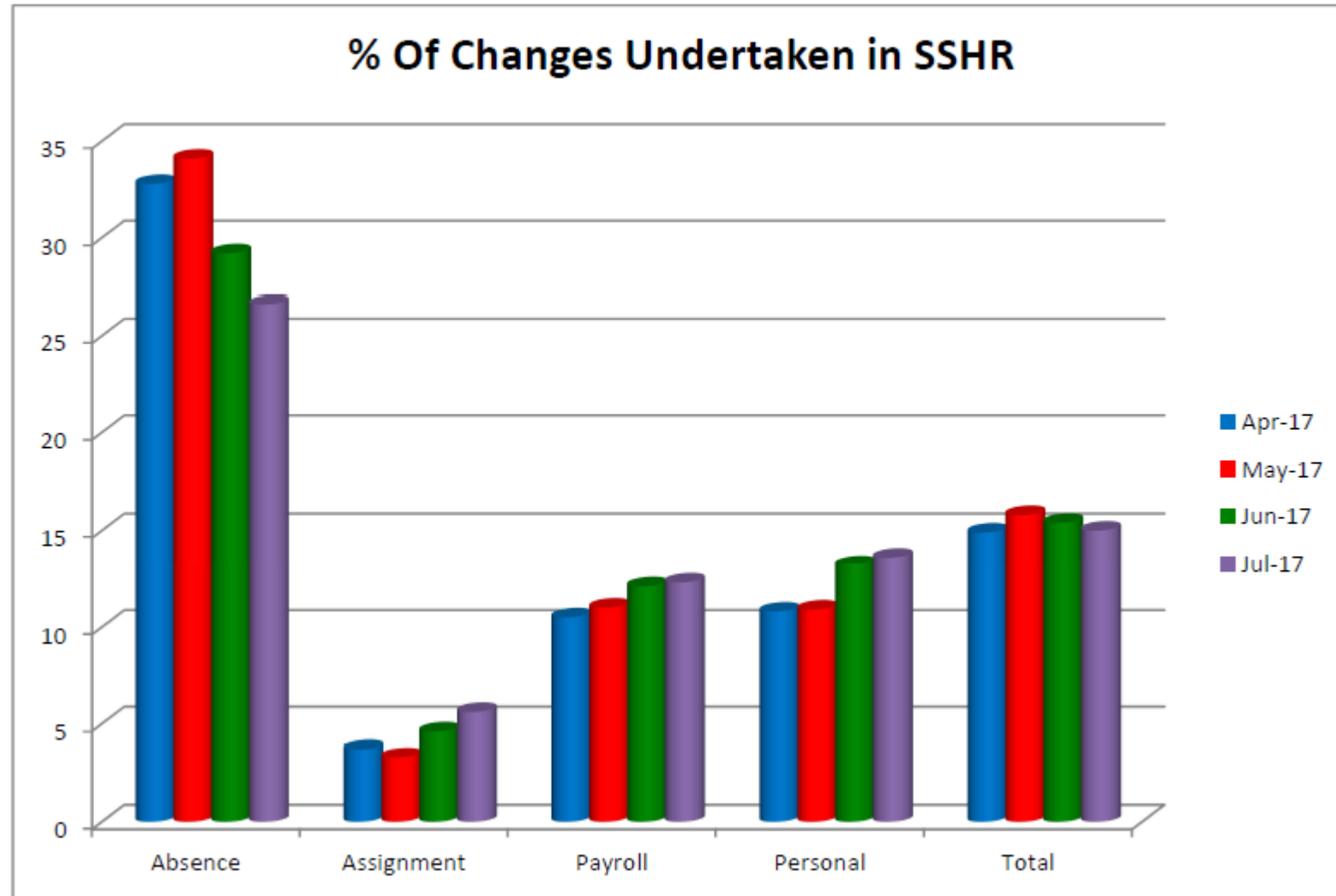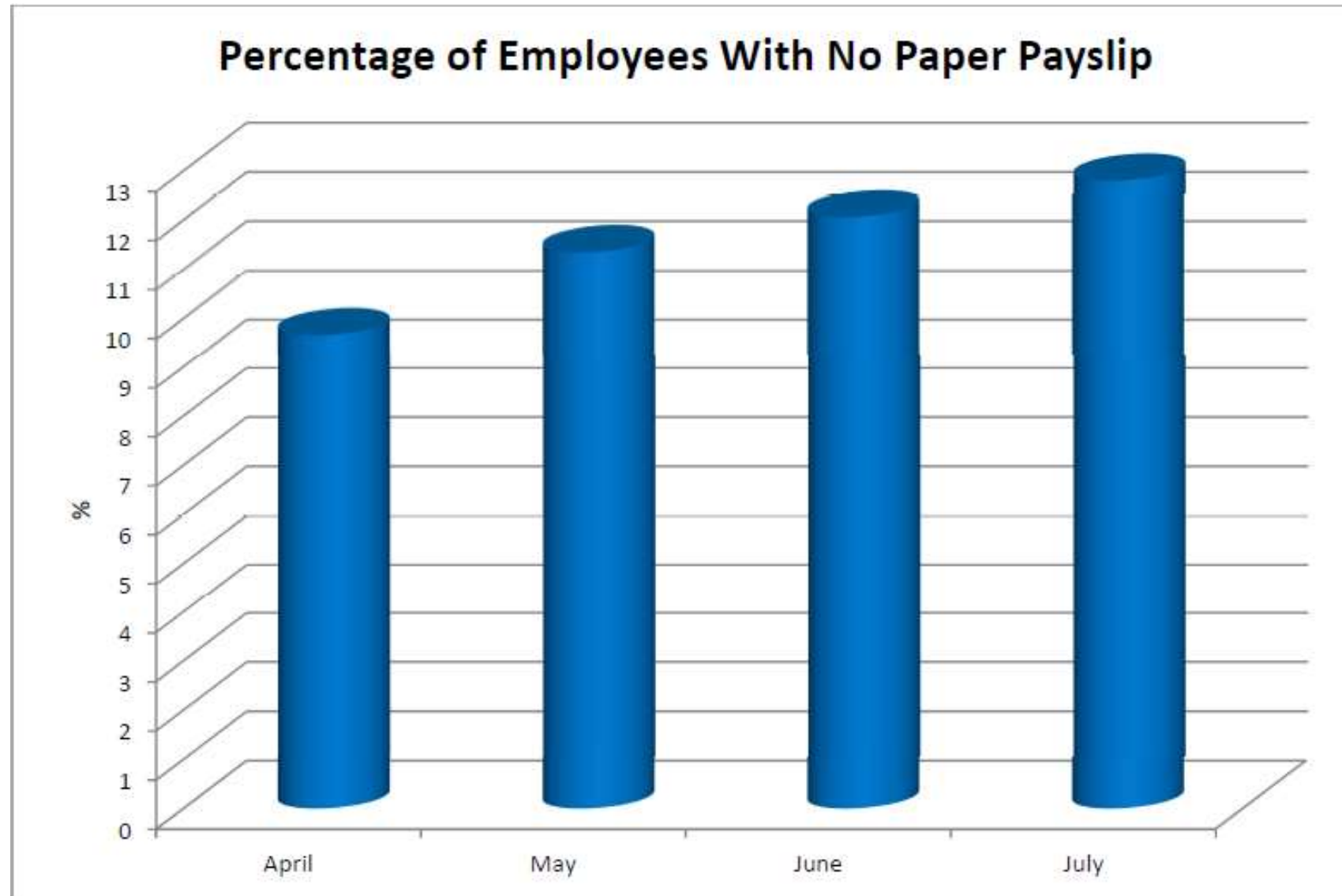
Electronic Staff Record Programme

- ESR Statistics
- Operational Information
- National Forums
- ESR Programme Update

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

LETB Name	Users	Without ESS or ESSLA	Percent Without
EAST MIDLANDS LETB	86819	5119	5.9%
EAST OF ENGLAND LETB	133886	41628	31.1%
KENT SURREY AND SUSSEX LETB	110244	27210	24.7%
NORTH CENTRAL AND EAST LONDON LETB	92682	7310	7.9%
NORTH EAST LETB	81948	9863	12.0%
NORTH WEST LETB	222508	30633	13.8%
NORTH WEST LONDON LETB	67053	3723	5.6%
SOUTH LONDON LETB	80419	9840	12.2%
SOUTH WEST LETB	116341	9773	8.4%
SPECIAL HA	45163	3134	6.9%
THAMES VALLEY LETB	48852	12764	26.1%
WALES	99252	1284	1.3%
WESSEX LETB	57936	10552	18.2%
WEST MIDLANDS LETB	150045	16562	11.0%
YORKSHIRE AND HUMBER LETB	153374	26927	17.6%
Grand Total	1546522	216322	14.0%

Changes initiated within Self-Service URPs – April – July 2017

% Of Changes Undertaken in SSHR

Electronic Staff Record Programme

NHS

Percentage of Employees With No Paper Payslip

eLearning vs. non eLearning: March – May 2017

	SHA	Non eLearning	eLearning	Total	Percentage
1	EAST MIDLANDS LETB	65,969	35,829	101,798	35.2
2	EAST OF ENGLAND LETB	125,111	59,098	184,209	32.08
3	KENT SURREY AND SUSSEX LETB	95,843	18,676	114,519	16.31
4	NORTH CENTRAL AND EAST LONDON LETB	51,739	36,248	87,987	41.2
5	NORTH EAST LETB	75,310	48,021	123,331	38.94
6	NORTH WEST LETB	207,338	90,106	297,444	30.29
7	NORTH WEST LONDON LETB	36,968	8,487	45,455	18.67
8	SOUTH LONDON LETB	58,874	5,903	64,777	9.11
9	SOUTH WEST LETB	79,069	28,722	107,791	26.65
10	SPECIAL HA	217	1,280	1,497	85.5
11	THAMES VALLEY LETB	29,956	35,703	65,659	54.38
12	WALES	35,522	61,956	97,478	63.56
13	WESSEX LETB	24,515	12,522	37,037	33.81
14	WEST MIDLANDS LETB	189,067	37,697	226,764	16.62
15	YORKSHIRE AND HUMBER LETB	108,199	50,055	158,254	31.63

eLearning

30.94

Up from 28% last round

Top 20 Organisations - e-Learning completions (May - Sept 2017)

	LETB	Organisation	Completions
1	WALES	ABERTAWE BRO MORGANNWG UNIVERSITY LHB	8215
2	WALES	CARDIFF AND VALE UNIVERSITY LHB	7306
3	NORTH CENTRAL AND EAST LONDON LETB	ROYAL FREE LONDON NHS FOUNDATION TRUST	7151
4	NORTH EAST LETB	THE NEWCASTLE UPON TYNE HOSPITALS NHS FOUNDATION TRUST	6792
5	NORTH WEST LETB	NORTH CUMBRIA UNIVERSITY HOSPITALS NHS TRUST	6257
6	WALES	ANEURIN BEVAN UNIVERSITY LHB	6036
7	THAMES VALLEY LETB	BUCKINGHAMSHIRE HEALTHCARE NHS TRUST	4852
8	NORTH WEST LETB	MERSEY CARE NHS FOUNDATION TRUST	4368
9	WALES	HYWEL DDA UNIVERSITY LHB	4173
10	WALES	BETSI CADWALADR UNIVERSITY LHB	4154
11	EAST MIDLANDS LETB	NOTTINGHAMSHIRE HEALTHCARE NHS FOUNDATION TRUST	4064
12	NORTH EAST LETB	TEES ESK AND WEAR VALLEYS NHS FOUNDATION TRUST	3900
13	WALES	CWM TAF UNIVERSITY LHB	3871
14	EAST OF ENGLAND LETB	NORFOLK AND NORWICH UNIVERSITY HOSPITALS NHS FOUNDATION TRUST	3715
15	KENT SURREY AND SUSSEX LETB	EAST KENT HOSPITALS UNIVERSITY NHS FOUNDATION TRUST	3627
16	SOUTH WEST LETB	ROYAL DEVON AND EXETER NHS FOUNDATION TRUST	3595
17	NORTH CENTRAL AND EAST LONDON LETB	EAST LONDON NHS FOUNDATION TRUST	3577
18	YORKSHIRE AND HUMBER LETB	CALDERDALE AND HUDDERSFIELD NHS FOUNDATION TRUST	3484
19	EAST OF ENGLAND LETB	ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	3479
20	NORTH EAST LETB	CITY HOSPITALS SUNDERLAND NHS FOUNDATION TRUST	3477

ESR Utilisation: OLM

Top 20 Organisations - % of headcount (May - Sept 2017)

	LETB	Organisation	%
1	EAST OF ENGLAND LETB	ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	85.02%
2	EAST MIDLANDS LETB	NOTTINGHAMSHIRE HEALTHCARE NHS FOUNDATION TRUST	81.81%
3	WEST MIDLANDS LETB	STAFFORDSHIRE AND STOKE ON TRENT PARTNERSHIP NHS TRUST	73.93%
4	WEST MIDLANDS LETB	SHROPSHIRE COMMUNITY HEALTH NHS TRUST	70.42%
5	NORTH WEST LETB	NORTH CUMBRIA UNIVERSITY HOSPITALS NHS TRUST	70.01%
6	NORTH EAST LETB	CITY HOSPITALS SUNDERLAND NHS FOUNDATION TRUST	68.87%
7	NORTH WEST LETB	WIRRAL COMMUNITY NHS FOUNDATION TRUST	61.15%
8	WESSEX LETB	PORTSMOUTH HOSPITALS NHS TRUST	60.42%
9	EAST OF ENGLAND LETB	ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	59.12%
10	NORTH CENTRAL AND EAST LONDON LETB	EAST LONDON NHS FOUNDATION TRUST	57.34%
11	NORTH WEST LETB	EAST CHESHIRE NHS TRUST	57.05%
12	EAST OF ENGLAND LETB	IPSWICH HOSPITAL NHS TRUST	56.86%
13	NORTH WEST LETB	CHESHIRE AND WIRRAL PARTNERSHIP NHS FOUNDATION TRUST	55.71%
14	THAMES VALLEY LETB	BUCKINGHAMSHIRE HEALTHCARE NHS TRUST	55.42%
15	NORTH EAST LETB	THE NEWCASTLE UPON TYNE HOSPITALS NHS FOUNDATION TRUST	52.69%
16	NORTH WEST LETB	NORTH WEST BOROUGHS HEALTHCARE NHS FOUNDATION TRUST	52.03%
17	EAST OF ENGLAND LETB	CAMBRIDGESHIRE COMMUNITY SERVICES NHS TRUST	51.71%
18	YORKSHIRE AND HUMBER LETB	LOCALA COMMUNITY PARTNERSHIPS CIC	50.31%
19	EAST OF ENGLAND LETB	NORFOLK AND NORWICH UNIVERSITY HOSPITALS NHS FOUNDATION TRUST	50.08%
20	WEST MIDLANDS LETB	WORCESTERSHIRE HEALTH AND CARE NHS TRUST	50.06%

Release 34 – 31st March 2017 (full details RN307)

SSHR

- Changes to compliance & competency
- Numerous field changes across SSHR
- Quick address search (QAS) enabled in SSHR
- Changes to appraisals and PMP
- Internet access to TRS via ESS

ESR

- ESR Portal
- Forgotten username or password

OLM

- New competency requirements
- Learning auto enrolment

Electronic Staff Record Programme

Release 34.2 – 28th April 2017 (full details RN311)

- Additional workflow notifications to email accounts

Release 34.3.0.0 – 25th May 2017 (full details RN314)

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

Release 35 – 3rd July 2017 (full details RN316)

- Suppression of FYA emails
- Case sensitivity for ESR passwords
- 'Search & View Learner' enabled in Class Admin URP
- Salary sacrifice elements to feed new balance for use with local pensions
- New Twitter portlet
- Payslip portlet – 'New' flag
- Enhancement to BI Configurable portlet
- MSS over the internet
- Common ID

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.

Operational Information

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
- Independent Service Auditor's Report (ISAE 3000)

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 NHS Digital as part of the new Information Governance Course (see UN2467, 17/7/17)

- Data Security Awareness - Level 1   1

NMC Fitness to Practise changes in ESR: Introduction of Disposals and Multiple FTP Sanctions (UN2474)

Advises users that following Section 60 changes to the Nursing & Midwifery Order of 2001, an enhancement has been made to the Professional Bodies Interface to handle the Disposals and Multiple Fitness To Practise (FTP) Sanctions information that will be sent by the NMC to ESR.

Updates to National eLearning Content

Statutory and Mandatory Content
Designed to meet the relevant learning outcomes in the UK Core Skills Training Framework

System Workforce Planning
An e-learning package to support workforce planning across a system using a four-step process

Midwifery Supervision
An e-learning package to support midwives in providing safe, high quality care to women and their families

JESIP
Working Together – Saving Lives

National Safeguarding & Resus courses sponsored being replaced with new versions.

000 Introduction to System Workforce Planning

Midwifery supervision has changed: A-EQUIP - Advocating and educating for quality improvement.

000 JESIP Awareness

Further details in UN2475 (Aug 2017)

The Care Certificate
Skills, knowledge and behaviours to provide compassionate, safe and high quality care and support

THE CARE CERTIFICATE

Consists of 15 standards, all individuals need to complete in full before they can be awarded their certificate.

Further details in UN2464 (July 2017)

The Data Security Awareness Level 1 e-Learning training package, which replaces the Information Governance (IG) training, is now live.

Further details in UN2467 (July 2017)

Updates to National IG eLearning Content (UN2467)

- Further to the interim IG Course as per UN2298, The Data Security Awareness Level 1 e-Learning training package, which replaces the Information Governance (IG) training, is now live.

- The topics are covered in 4 modules

- The existing NHS|MAND|Information Governance competences and NHS|CSTF|Information Governance competences will not be changed as part of this update

- The following courses have been end dated on the 31st August. Enrolments to these courses have been end dated on 31st July.
    - 000 Introduction to Information Governance (NHS Digital)
    - 000 Information Governance: The Refresher Module (NHS Digital)
    - 000 The Beginner's Guide to Information Governance (NHS Digital)
    - 000 eAssessment UKCSTF Information Governance (Regionally Provided)

ESR NHS-0210 – ESR Development Schedule R36 Subject to Testing

R36

- **CCN039 - Enhance occupational health IAT notification**
  - The occupational health pre-IAT notification will be enhanced to include the following

- **CCN040 – Extension of NHS NEST contributions report**

- **CCN044 – Enhancement to MSS team actions and ESS upcoming events portlets**
  - The manager's team actions portlet will be enhanced to include competency expiry dates and employee incremental dates. A drop down selection will also be available to filter to a type of event.
  - The employee's upcoming events portlet will be enhanced to include competency expiry dates and incremental dates.

- **CCN047 – Enhancement to entitlement balance portlet**
  - The entitlement balance portlet will now include position name
  - Leave values displayed will be broken down
  - **CCN053 - Local links portal enhancement**
  - Wil allow the order of the links to be defined by the organisation (new portlet in the library)

  Refer to NHS-0210 on KBase for full details of all enhancements being released from R36 onwards

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 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

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

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](#)

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

Electronic Staff Record Programme

NHS

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

Electronic Staff Record Programme

NHS

The Central Account Manager and Functional Advisor Teams will be contacting you to arrange follow up meetings following your ESR Assessments and Reports.

This will enable us to:

➢ Understand your ESR vision

➢ Offer guidance and give you access to toolkit of resources and on-site support

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

Questions

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@nhsesr – please follow us!

Thank you