NW ESR BIG SIG
Tuesday 21st February 2017

WiFi Code:
HAYDOCK GUEST
WelcomeGuest16

Twitter:
#ESRBIGSIG

Developing people
for health and
healthcare

www.hee.nhs.uk

Thank you to all the speakers, SIG Chairs and the 92 attendees from the NW who contributed to this event

Welcome

House Keeping
    Premier Suite: NW ESR BIG SIG (am)
                                    Reporting /HR/Finance (pm)
    Conservatory: OLM / Self Service SIG (pm)

Overview of the Day
Hot Topics & Questions Submitted
Follow-Up and Evaluation

Agenda

(Subject to minor amendments)

Time	Item	Speaker / Chair Person	Room
9.00 am - 9.30 am	Tea & Coffee on arrival	All	Premier Suite
9.30 am	Welcome & Introductions for the day – hot topics / questions for the workshops	NW ESR Regional User Group / Mike Gibney - NW ESR RUG Chair & Director of Workforce at Walton Centre	Premier Suite
9.40 am	Sustainability & Transformation Plans (STPs) / Back Office	Mike Gibney	Premier Suite
10.15am am	NSIG Updates	Alison Terry	Premier Suite
10.30 am	Tea & Coffee & break		
10.45 am	North West Streamlining Group Overview	Emma Turner	Premier Suite
11.15 am	Central ESR updates	ESR Central Team and IBM	Premier Suite
11.45 am	HEE NW Update – Future of NW ESR BIG SIG	Emma Hood	Premier Suite
12.00 pm	Lunch Break		
1.00 pm	Reconvene after lunch – Focus on Afternoon SIGs	Mike Gibney - NW ESR RUG Chair & Director of Workforce at Walton Centre	Premier Suite
1.10 pm	SIG 2 – OLM / Self Service		Conservatory
	SIG 3 – Reporting, HR and Finance		Premier Suite
4.00pm	Close	All	

Mike Gibney, Director of Workforce at The Walton Centre FT shared an overview of the C&M STP plan and structure.

Click Here to visit the Kings Fund information on STPs

Greater Manchester STP:
http://www.gmhsc.org.uk/delivering-the-plan/

Cheshire & Merseyside STP:
http://www.liverpoolccg.nhs.uk/media/1856/cheshire-merseyside-stp_issue_version-4-4_15-nov-16.pdf

Lancashire & South Cumbria STP:
http://www.lancashiresouthcumbria.org.uk/sustainability-and-transformation-plan

North West Streamlining Programme

Streamlining Staff Movement

Update to ESR SIG 21.02.2017

Objectives

- To provide an update on the following:
  - ELearning for Health
  - RoSTA
- To provide an update on overall progress of the streamlining programme approaching end of year 1
- To share the challenges faced and discuss the next steps

ELearning for Health

- Project led by E-LfH to develop a set of National Core Skills e-learning packages. First phase of implementation is 31.03.17

- The Programme Team will no longer maintain the NW e-learning packages once the National ones are released but, will maintain the readers and presentation slides etc.

- The National framework is built on new Adapt Software that is the latest in e-learning technology

- The programme team will strongly encourage trusts to move to the National packages as a compliant framework

- Support via the successful user group will provide ongoing support during this transition

RoSTA
Register of Skills, Training and Achievements

- The RoSTA System is currently live with all Junior Doctor data

- Majority of Trusts in the NW have access to RoSTA and are able to view and use the Junior Doctor Training to eliminate duplication of training

- A compliance report is currently being built which enables Trusts to report on whether Junior Doctors are complaint with all their Mandatory Training.

Streamlining in the North West

- Programme established in March 2016

- All provider Trusts have signed up to an MOU committing to take part in and fund the programme

- Governance arrangements established including Programme Board ,STP level workstreams, etc.

- The workstreams have been set up and held their initial meetings

- Programme objectives, deliverables and benefits have been defined relating to the 3main workstreams in each area ; recruitment, occupational health, statutory and mandatory training and additional workstreams as prioritised by the STP areas

- Trust based implementation teams are being formed and are starting to meet every 1-2 months

High Level Deliverables

- Reduce the time to hire

- Reduce unnecessary staff time spent on statutory and mandatory training

- Improved staff satisfaction with the recruitment and induction process

- Release administration time/costs as a result of standardisation and reduction in duplication

Expected Deliverables Year 1

Recruitment	Training	Policy
Pre hire IAT used by all	Realise benefit of CSF alignment by reducing duplication and induction for NHS Staff	Standardise Honorary Contract & Notice periods
Pre hire IAT used to transfer information from Trust to Trust for training and factual references - switched on and to review training	Alignment to national refresher periods	Determine deliverables for year 2 of the programme
Factual references in ESR implemented by all alongside usual reference processes		
Values based recruitment - current values mapped against all NHS constitution and 6C's		
DBS update service encouraged by all and mandated options scoped		
Provide consistent approach to Honorary contracts		

Continued...

Occupational Health	Students/PEFs (C&M only)	System Enablers (C&M only)
Agreement on clinical consistency in application of immunisations of vaccinations (I&V)	Standardise venepuncture theoretical	Minimum data set in ESR as required for IAT
Trial of sharing I&V IAT using ESR module commenced		Enable non OLM users to enter core skills competencies in OLM

Achievements for Year 1

- Programme established & successful launch event held.

- All provider Trusts signed up to an MOU committing to take part in and fund the programme in year 2 and 3 as a joint contribution with HEE.

- Governance arrangements and delivery structure established and fully operational including Programme Board, STP level steering groups and STP workstreams.

- Trust Implementation Groups (TIGs) established in all Trusts.

- Programme & workstream objectives, deliverables and benefits have been defined relating to the 3 main workstreams in each area; recruitment, occupational health, statutory and mandatory training and additional workstreams as prioritised by the STP areas.

- Trade Unions engaged and actively involved in the programme.

- RoSTA System launched and loaded with Junior Doctor data in time for Feb 17 rotation.

- NW e-learning resources fully updated to reflect V1.3 of the CSF.

- All students successfully migrated over to the e-lfh platform.

- Profile of the programme raised with CEOs and STP leads.

Challenges faced..

- Capacity to take part in the streamlining activities set against already busy agendas

- The need to link up work stream activity at a trust level

- Significant variation in the starting points for trusts in relation to the processes relating to streamlining

- Different levels of individuals being appointed by trusts as workstream representatives with varying skills and experience in leading projects and change

- The changing landscape of the NHS with the amalgamation of Trusts

- Clarity of roles and responsibilities between Programme and Trust based individuals

Next Steps

- To support Trusts in developing their local arrangements in preparation for year 2 of the programme

- For programme office to assist in identifying any gaps which may need support

- To ensure that there is clarity of roles and responsibilities at each level of the programme

- Provide the local HRD network with an overview of the areas readiness to implement streamlining

Thank you

Please contact your local Project Manager for further information

Mark Burke	Jenny Rowlands	Stella Abbinante
Cumbria & Lancs	Greater Manchester	Cheshire & Mersey
markburke@nhs.net	jenny.rowland@nhs.net	stella.abbinante@nhs.net

Electronic Staff Record Programme

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

VPD Count of Self Service Usage by Change Event
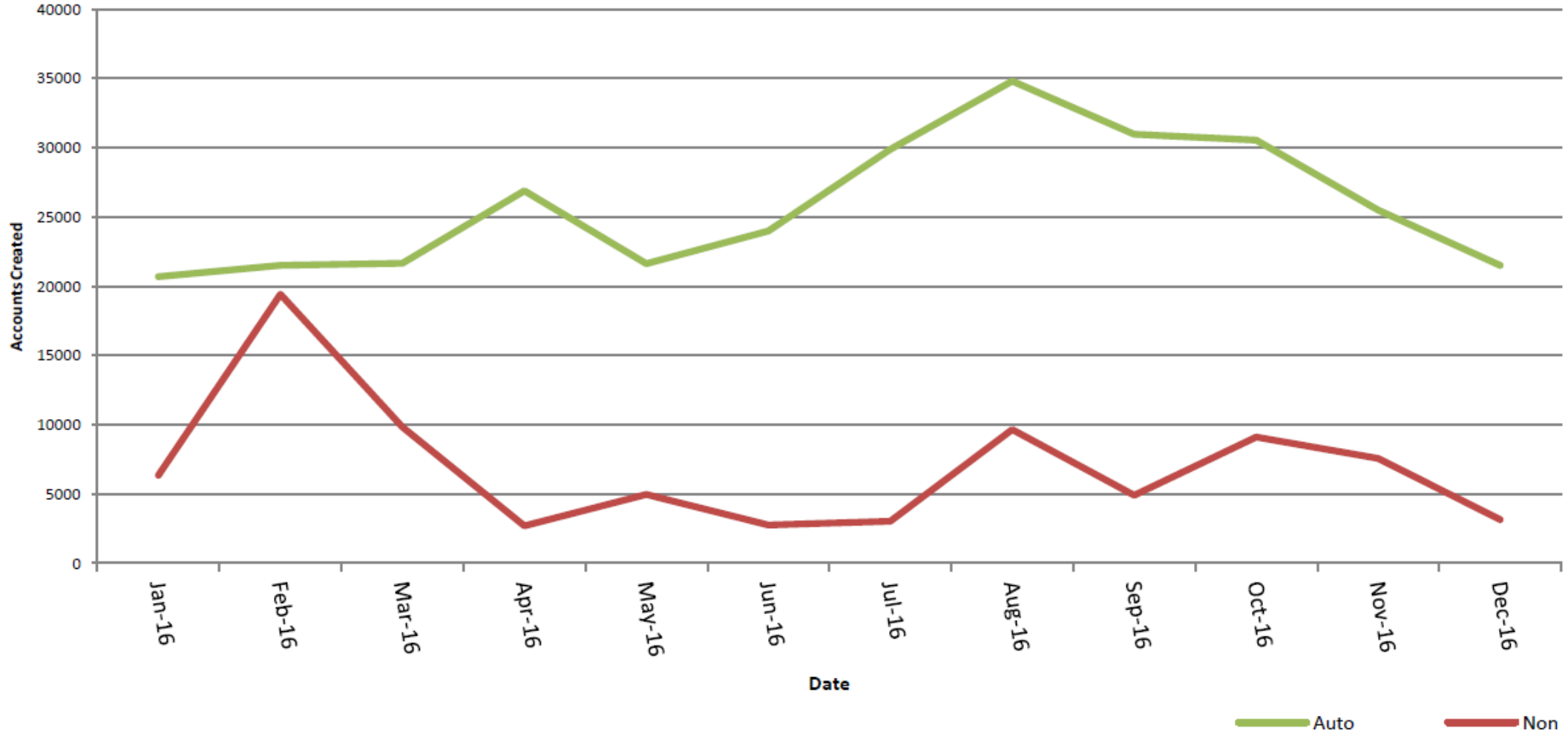

(Dec-2016)

Legend: Personal, Absence, Assignment, Payroll

- Personal: 319
- Absence: 178
- Assignment: 160
- Payroll: 148
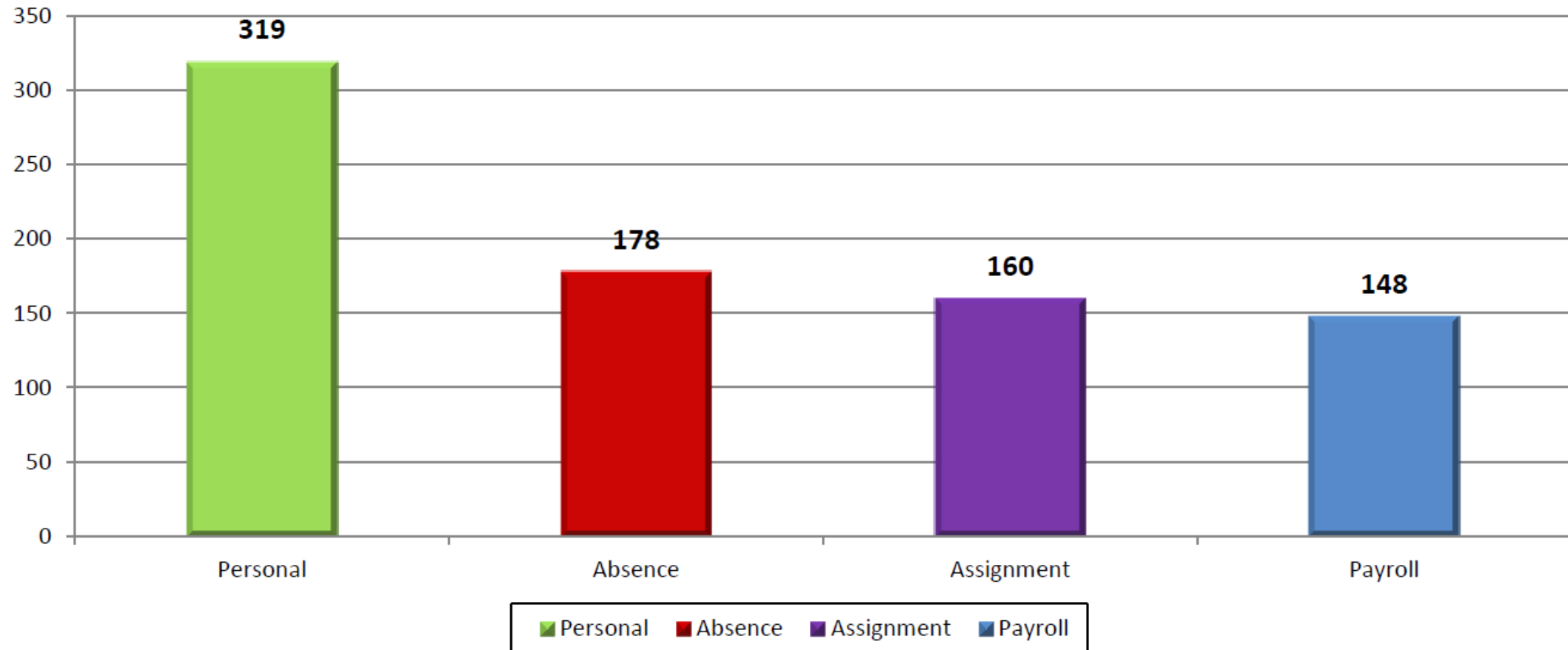
Regional Breakdown of Self Service Use

(Dec-2016)

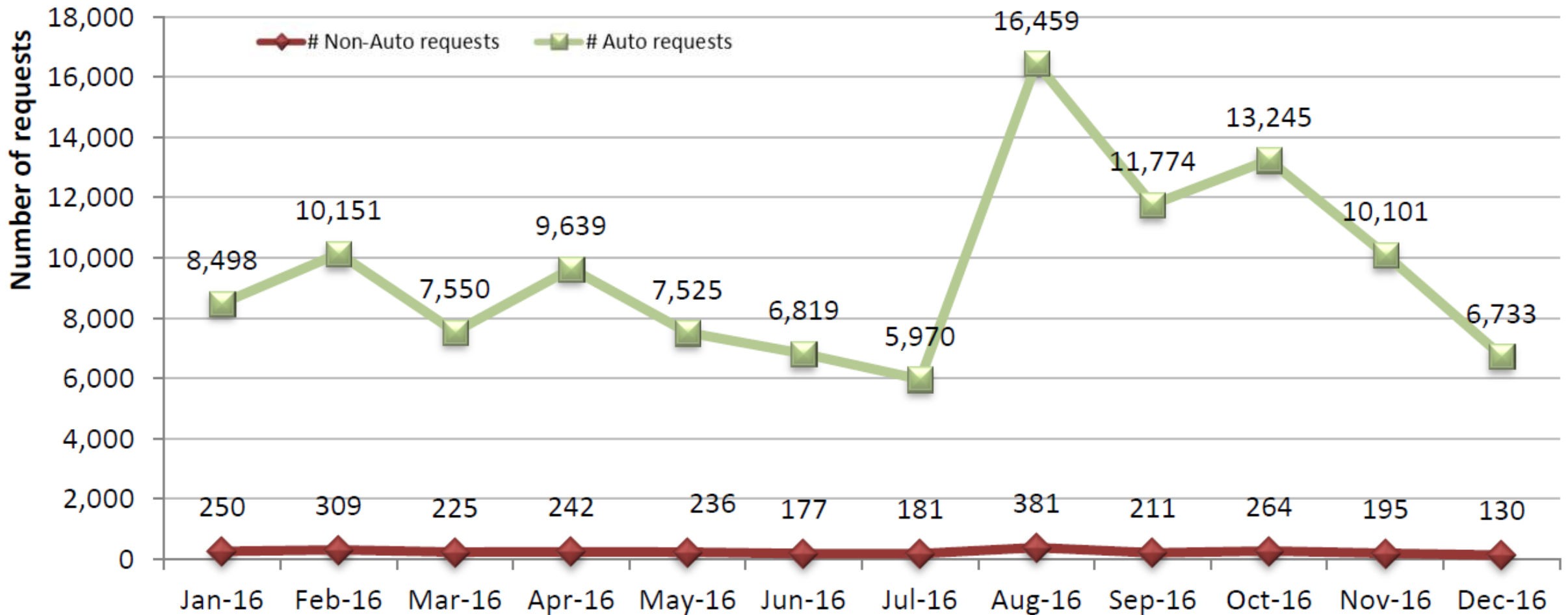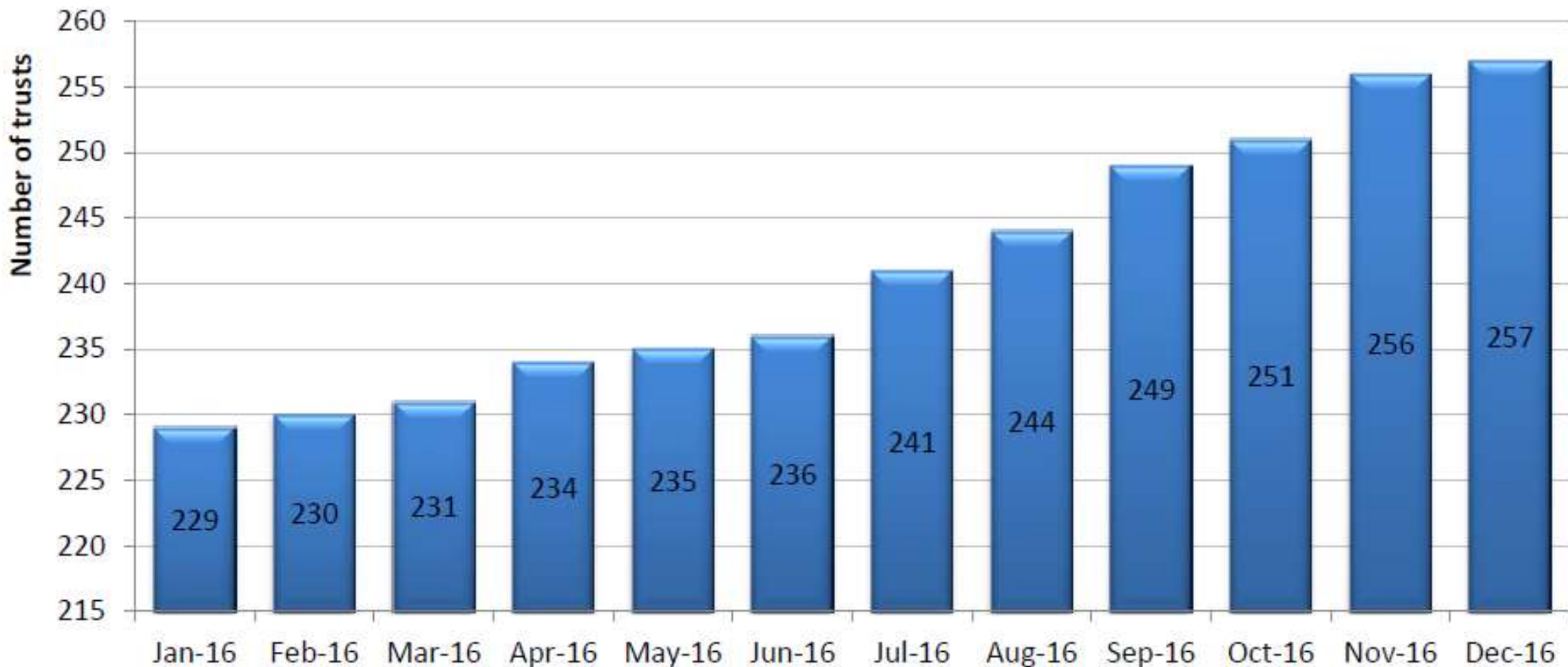# ESR Utilisation: User Account Creation

Electronic Staff Record Programme
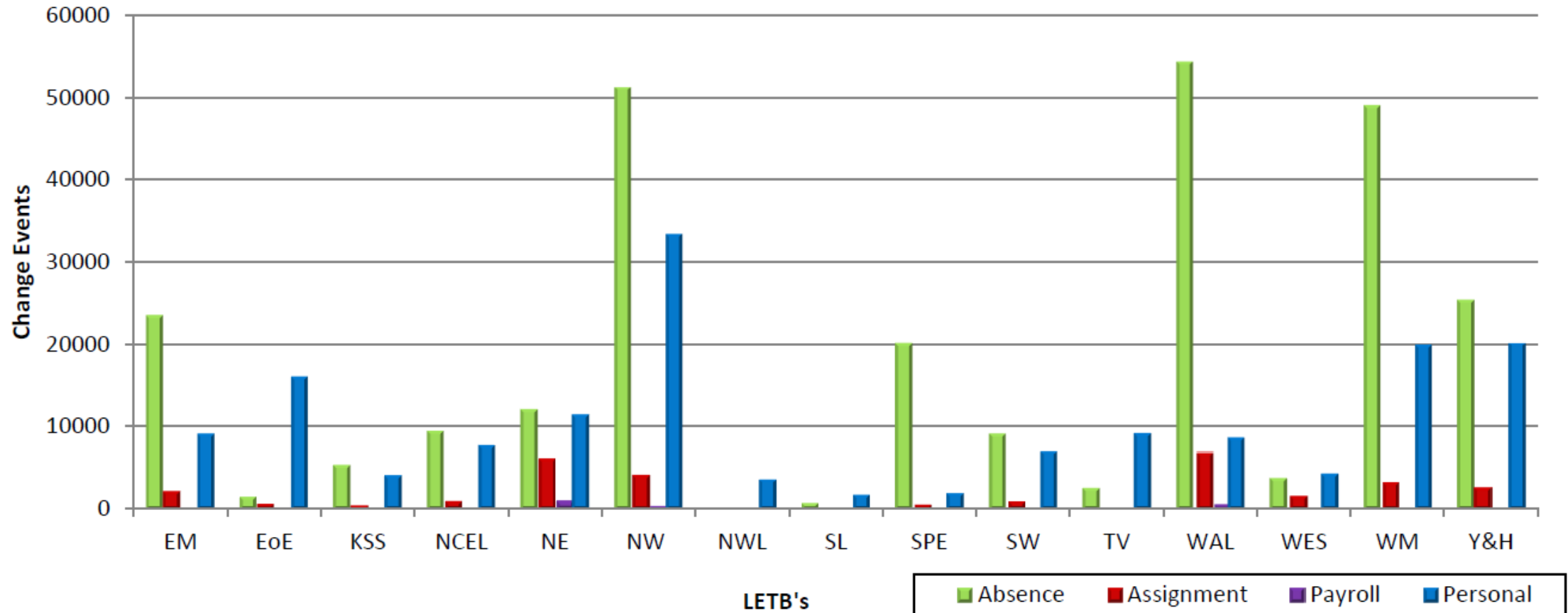
498 organisations have Auto User setting enabled

IAT Requests – automated and non-automated

Allocation of IAT Stat/Mand Competencies Ntf Role

Electronic Staff Record Programme

NHS

Allocation of IAT Reference Roles

IAT Reference Roles upto December-2016

Legend: ■ Reference Approver ■ Reference Receipt
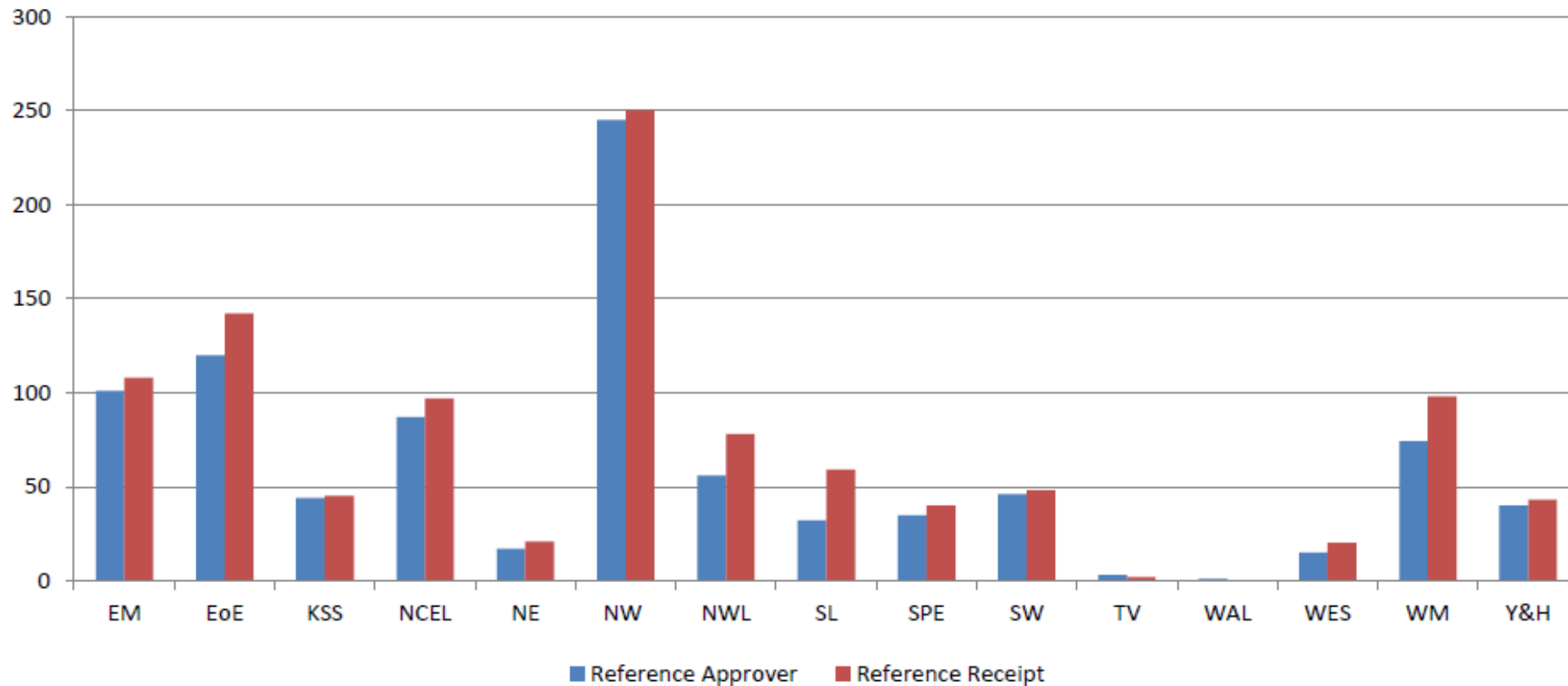
December: 916 Reference Approver and 1051 Reference Receipt role holders. 200 VPDs have allocated at least one of the roles

July 2016 – November 2016

LETB	Non-eLearning	eLearning	Total	%
East Midlands	74540	21523	96063	22.41%
East of England	133105	48576	181681	26.74%
Kent Surrey and Sussex	112594	27716	140310	19.75%
North Central and East London	67834	32497	100331	32.39%
North East England	100612	23944	124556	19.22%
North West England	208583	61804	270387	22.86%
North West London	44339	17038	61377	27.76%
South London	74795	7546	82341	9.16%
Special Health Authorities	445	1656	2101	78.82%
South West England	101685	31396	133081	23.59%
Thames Valley	36466	29434	65900	44.66%
Wales	57525	8143	65668	12.40%
Wessex	27936	8623	36559	23.59%
West Midlands	202444	40563	243007	16.69%
Yorkshire and Humber	118637	60828	179465	33.89%
Total	**1361540**	**421287**	**1782827**	**23.63%**

23.63% e-learning completions

Top 20 Organisations - e-Learning completions in November 2016

	LETB	Organisation	Completions
1	THAMES VALLEY LETB	BUCKINGHAMSHIRE HEALTHCARE NHS TRUST	4915
2	NORTH CENTRAL AND EAST LONDON LETB	ROYAL FREE LONDON NHS FOUNDATION TRUST	4863
3	KENT SURREY AND SUSSEX LETB	EAST KENT HOSPITALS UNIVERSITY NHS FOUNDATION TRUST	3925
4	NORTH WEST LONDON LETB	CENTRAL LONDON COMMUNITY HEALTHCARE NHS TRUST	3507
5	EAST MIDLANDS LETB	NOTTINGHAMSHIRE HEALTHCARE NHS FOUNDATION TRUST	3395
6	EAST OF ENGLAND LETB	NORFOLK AND NORWICH UNIVERSITY HOSPITALS NHS FOUNDATION TRUST	3330
7	EAST MIDLANDS LETB	UNITED LINCOLNSHIRE HOSPITALS NHS TRUST	3123
8	YORKSHIRE AND HUMBER LETB	CALDERDALE AND HUDDERSFIELD NHS FOUNDATION TRUST	3049
9	WEST MIDLANDS LETB	UNIVERSITY HOSPITALS COVENTRY AND WARWICKSHIRE NHS TRUST	3027
10	NORTH WEST LETB	STOCKPORT NHS FOUNDATION TRUST	2858
11	KENT SURREY AND SUSSEX LETB	MEDWAY NHS FOUNDATION TRUST	2814
12	THAMES VALLEY LETB	SOUTH CENTRAL AMBULANCE SERVICE NHS FOUNDATION TRUST	2758
13	WEST MIDLANDS LETB	WORCESTERSHIRE HEALTH AND CARE NHS TRUST	2752
14	NORTH WEST LETB	PENNINE CARE NHS FOUNDATION TRUST	2648
15	EAST OF ENGLAND LETB	SOUTH ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	2480
16	YORKSHIRE AND HUMBER LETB	HARROGATE AND DISTRICT NHS FOUNDATION TRUST	2460
17	NORTH EAST LETB	TEES ESK AND WEAR VALLEYS NHS FOUNDATION TRUST	2454
18	SOUTH WEST LETB	ROYAL DEVON AND EXETER NHS FOUNDATION TRUST	2233
19	NORTH WEST LETB	MERSEY CARE NHS FOUNDATION TRUST	2158
20	SOUTH WEST LETB	ROYAL UNITED HOSPITALS BATH NHS FOUNDATION TRUST	2095

ESR Utilisation: OLM

Top 20 Organisations - % of headcount (Sep-Nov 2016)

	LETB	Organisation	%
1	EAST OF ENGLAND LETB	EAST COAST COMMUNITY HEALTHCARE CIC	71.82%
2	NORTH WEST LETB	CUMBRIA PARTNERSHIP NHS FOUNDATION TRUST	61.65%
3	SOUTH WEST LETB	GLOUCESTERSHIRE CARE SERVICES NHS TRUST	59.57%
4	NORTH WEST LONDON LETB	CENTRAL LONDON COMMUNITY HEALTHCARE NHS TRUST	59.22%
5	NORTH WEST LONDON LETB	NHS HILLINGDON CCG	59.02%
6	EAST OF ENGLAND LETB	SOUTH ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	58.82%
7	NORTH WEST LONDON LETB	NHS EALING CCG	57.84%
8	YORKSHIRE AND HUMBER LETB	HARROGATE AND DISTRICT NHS FOUNDATION TRUST	57.08%
9	KENT SURREY AND SUSSEX LETB	MEDWAY NHS FOUNDATION TRUST	56.41%
10	WEST MIDLANDS LETB	WORCESTERSHIRE HEALTH AND CARE NHS TRUST	56.23%
11	EAST OF ENGLAND LETB	NORTH ESSEX PARTNERSHIP UNIVERSITY NHS FOUNDATION TRUST	56.23%
12	NORTH WEST LONDON LETB	NHS HAMMERSMITH AND FULHAM CCG	56.00%
13	YORKSHIRE AND HUMBER LETB	LOCALA COMMUNITY PARTNERSHIPS	54.70%
14	WEST MIDLANDS LETB	ROBERT JONES AND AGNES HUNT ORTHOPAEDIC HOSPITAL NHS FOUNDATION TRUST	54.47%
15	NORTH WEST LONDON LETB	NHS BRENT CCG	52.56%
16	NORTH WEST LONDON LETB	NHS CENTRAL LONDON (WESTMINSTER) CCG	51.56%
17	KENT SURREY AND SUSSEX LETB	SURREY AND BORDERS PARTNERSHIP NHS FOUNDATION TRUST	50.59%
18	THAMES VALLEY LETB	SOUTH CENTRAL AMBULANCE SERVICE NHS FOUNDATION TRUST	50.46%
19	THAMES VALLEY LETB	BUCKINGHAMSHIRE HEALTHCARE NHS TRUST	49.87%
20	KENT SURREY AND SUSSEX LETB	EAST KENT HOSPITALS UNIVERSITY NHS FOUNDATION TRUST	48.52%

Electronic Staff Record Programme

NHS

Release 33 – 30th December 2016. Full details in RN297

- Oracle desktop & mobile skin deployment
- E-learning & Self-Service menu structures
- Field changes across SSHR
- Learner Home Page and Certificate Renewal
- OLM Search for Learning Administration
- ESR Workflow Email Notification
- Change Event auditing extension to current functionality

Release 33 – 30th December 2016. Full details of BI enhancements in RN298

- Reporting on Vacant Positions
- Online Payslip - Employee and Trust level EITs
- Changes for Payroll
- Enabling Cost Centre Hierarchy Reporting
- Changes to Assignment Dimension

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 *(AMs: customise list as appropriate for each audience)*

- 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

- ESR-NHS0060 - Workflow Notifications Guide v18.0.pdf

- ESR-NHS0137 - A Guide to Implementing Self Service v8 0.pdf

- New ESR Roadmap section on Kbase home page

- ESR-NHS0200 OLM Implementation Guide v7 0.pdf

- MM-0100 Organisation Site IT Printer and Network Infrastructure Readine v23.0.pdf

- ESR-NHS0111 The Streamlined ESR and Junior Doctor Interface Guide v2.0.pdf

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.

Updates to National eLearning Content

Further details in UN2258 (November 2016)

Further details in UN2271 (December 2016)

Further details in UN2287 (January 2017)

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

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

Electronic Staff Record Programme

NHS

Quarter 1 – 2017
(Development request submission deadline Friday 20 January 2017)

Wednesday 18 January 2017	NSIG Chairs meeting	Sheffield
Wednesday 22 February 2017	Joint National SIG event/NSIG meetings	Sheffield

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

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

We are currently contacting every Trust in the region to book your ESR Assessment

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

Name

Mike.winstanley@nhs.net

Tel: 07824 502930

@nhsesr – please follow us!

Thank you

It's your ESR

It's your ESR

ESR Roadmap Update

21st February 2017
North West – SIG
David Bromilow
ESR Functional Advisor
Northwest England and Wales

@NHSESR

@DaveBrom

The developments referenced are subject to successful testing and release

Any of the information within this presentation is subject to change

Roadmap Principles

- Overall 2016/2017 Roadmap includes:
    - Improved user interface for self service and learning management (including a portal)
    - Business process improvements to support self service and learning management;
    - Enhanced reporting for payroll
    - A comprehensive reporting strategy to support the withdrawal of Discoverer

- An upgrade to Oracle 12.2 is required and has been scheduled for December 2017

- The user driven development process will be placed 'on hold' to enable all resources to focus on delivery of the roadmap. However, users can still raise requests for NSIG consideration
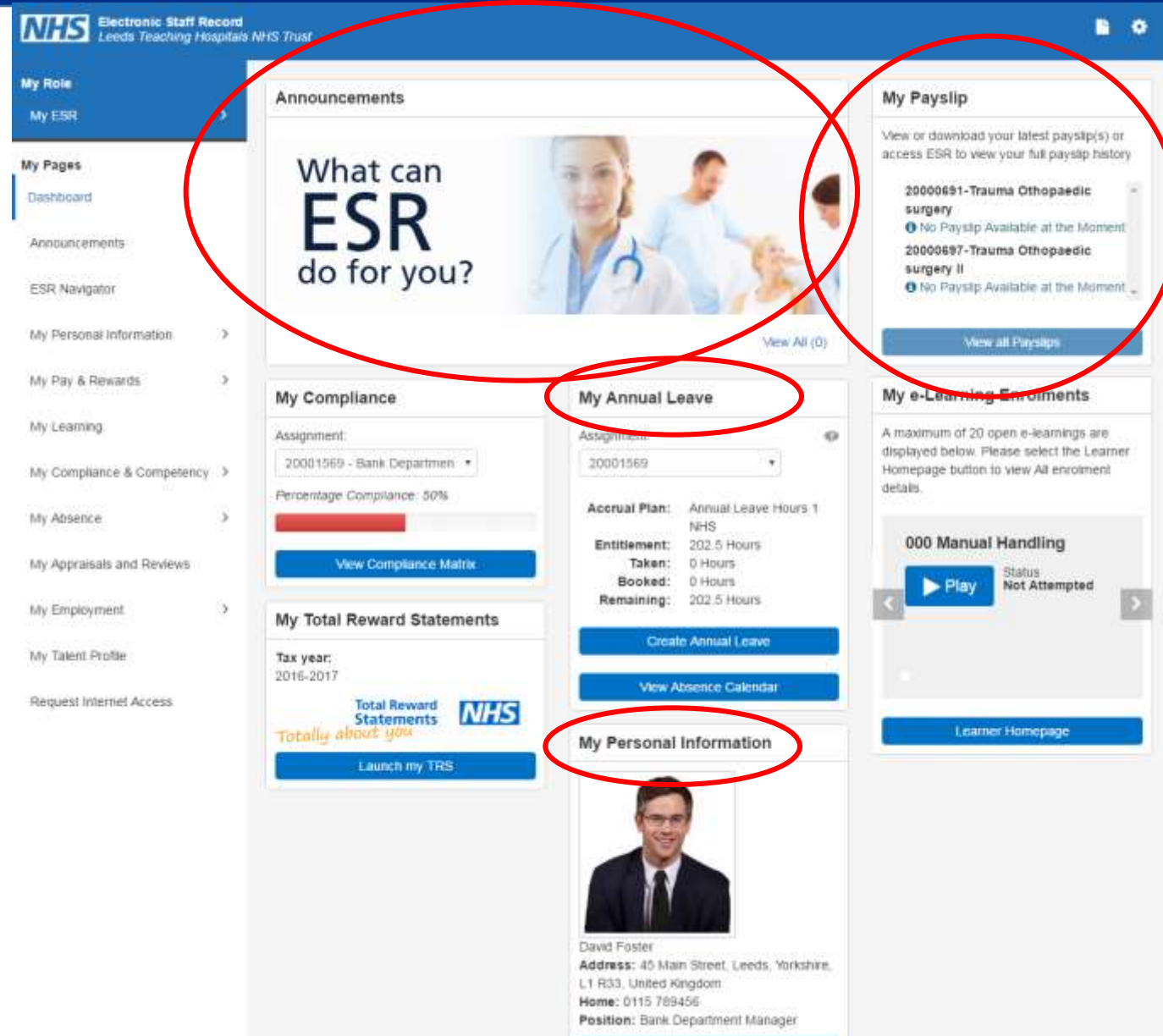
ESR Portal Update

- Initial 'Beta' site release in January 2017 – N3 facing only;
- Full general release due Post Release 34 **(Without Prejudice and Subject to Successful Testing)**

- Key design principles:
  - **My ESR** - Key information delivered directly to the employee landing page;
  - Tablet and mobile friendly;
  - Employee and manager dashboards initially;
  - National 'portlet library';

Portal Beta Sites

NHS

Activity Stats

Organisation	Unique Logons	Overall interactions
Birmingham Community	71	274
Bradford	54	481
Burton	219	1125
Northumbria Health Care NHS Trust	53	253
Nottingham	19	725
Portsmouth	2784	9966
Royal Devon and Exeter	82	273
Velindre	24	461
Grand Total	3306	13558

- National Broadcast message 'portlet':
  - Can be defined nationally or locally (by approved users);
  - Can be targeted at specific URPs;
  - Includes images and hyperlinks.
- Dedicated portlet to indicate current annual leave entitlement, leave already taken, any booked in the future and the remaining allowance;
- Navigate directly to either create a new annual leave request for the selected assignment or go to the Absence Calendar in Self Service to view all leave details.

- National 'portlet' for recent payslips;
- Easy access to all payslip history with employer.

- Personal information portlet detailing Name, Address, phone number and primary assignment position.
- Direct navigation to ESR forms to update details

- Dedicated portlet to indicate the current level of compliance against competency requirements;
- Total compliance percentage and status indicator bar for simple view of the current position;
- Navigate directly to the Compliance Matrix to view the full competency and compliance profile.

- Shows most recently interacted e-learning enrolments;
- Click to play directly from the portal;
- Improved integration/ automation with Certification renewal.

- 2 new URPs to be allocated; Portal Administrator and the Content Editor, these will have to be given to different employees

- Engage with your IT department to ensure they have adhered to the MM-0100 document

- Consider your current entry points to ESR, e.g. Desktop Icon, links on the intranet, Favourites, email links. These will have to be replaced with the 2 new URLs

- Timings and communications is crucial to ensure that the new entry points to ESR are replaced and all employees and managers are aware of this

- Agree in advance what Portlets and communications are going to be visible on go live

- As each of the Portlets are very visible, any data cleanse leading up to the go live should be completed

ESR Roadmap - General

Transforming User Experience

- Internet Enablement
- Portal Beta Site (including mobile)
- EBS UI skin (including mobile)
- ESS UI Optimisation Part 1
- MSS UI Optimisation Part 1
- OLM "Quick Wins"

June 16	September 16	December 16	March 17	June 17	September 17	December 17

Increasing Business functionality

- SA2 On-line payslip
- SA1 Restrict Own record
- SA8 Proxy Users
- On-line payslip ESS Opt Out
- GR1 Welsh requirements
- GR8 E-mail notification Part 1
- PAY1 Payroll analysis
- PAY5 NI changes
- Payslip Part 2

Oracle 12.2 Upgrade

ESR Roadmap – Reporting

Electronic Staff Record Programme

NHS

	August 16	September 16	December 16	March 17	June 17	September 17	December 17
Reporting Strategy	Reporting Quick Wiins		Reporting OBIEE Drop 1				Oracle 12.2 Upgrade
			SA3 Change Event Audit				
			PAY1 Payroll analysis				

ESR Roadmap - General

Transforming User Experience

								Oracle 12.2 Upgrade
		Internet Enablement	Portal Beta Site (including mobile)	Portal full release (internet)				
			EBS UI skin (including mobile)					
			ESS UI Optimisation Part 1	ESS UI Optimisation Part 2				
			MSS UI Optimisation Part 1	MSS UI Optimisation Part 2				
			OLM "Quick Wins"					

June 16	September 16	December 16	March 17	June 17	September 17	December 17

Increasing Business functionality

June 16	September 16	December 16	March 17	June 17	September 17	December 17
SA2 On-line payslip	On-line payslip ESS Opt Out	GR1 Welsh requirements	PAY2 Leavers early in month			
SA1 Restrict Own record		GR8 E-mail notification Part 1	LM1 Competency Requirements			
SA8 Proxy Users		PAY1 Payroll, increment analysis	LM2 Auto Enrolment			
		PAY5 NI Adjustments	Payslip Part 3			
		Payslip Part 2				

ESR Roadmap – Reporting

	August 16	September 16	December 16	March 17	June 17	September 17	December 17
Reporting Strategy	Reporting Quick Wiins		Reporting OBIEE Drop 1				Oracle 12.2 Upgrade
			SA3 Change Event Audit				
			PAY1 Payroll analysis	SA3 View Event Audit			
				External Data Integration			
				BI through Portal			

Webinar 1

- General release of the ESR Portal;

- New appraisal forms;

- New combined compliance form;

- Introduction of Quick Address System (QAS) for Self Service;

- Competency requirements development;

- Auto Enrolment functionality.

Webinar 2

- Webinar 2 relates to the ESR Portal and will provide information on how the portal can be personalised for an organisation or an individual. Representatives from beta pilot sites will join these webinars to provide first hand feedback on their experiences.

Release 34 Webinar Dates

Webinar 1 – UI optimisation	23 February 2017 at 2 pm
	24 February 2017 at 10 am
	27 February 2017 at 2 pm
	1 March 2017 at 3 pm

Adobe Acrobat Document

Webinar 2 – ESR Portal	24 February 2017 at 2 pm
	27 February 2017 at 11 am
	28 February 2017 at 12 pm
	3 March 2017 at 2 pm

Further webinars are planned for Payroll colleagues to go through specifically year end updates and release 34 Enhancements.

Electronic Staff Record Programme

NHS

d.bromilow@nhs.net

Tel: 07766161772

@nhsesr – please follow us!

Thank you

It's your ESR

IBM Update

Fiona Gregory

IBM Head of ESR Customer Relations

Customer Satisfaction

JAN-17 5.7

DEC-16 5.9

NOV-16 5.9

POOR FAIR GOOD GREAT

Electronic Staff Record Programme

NHS
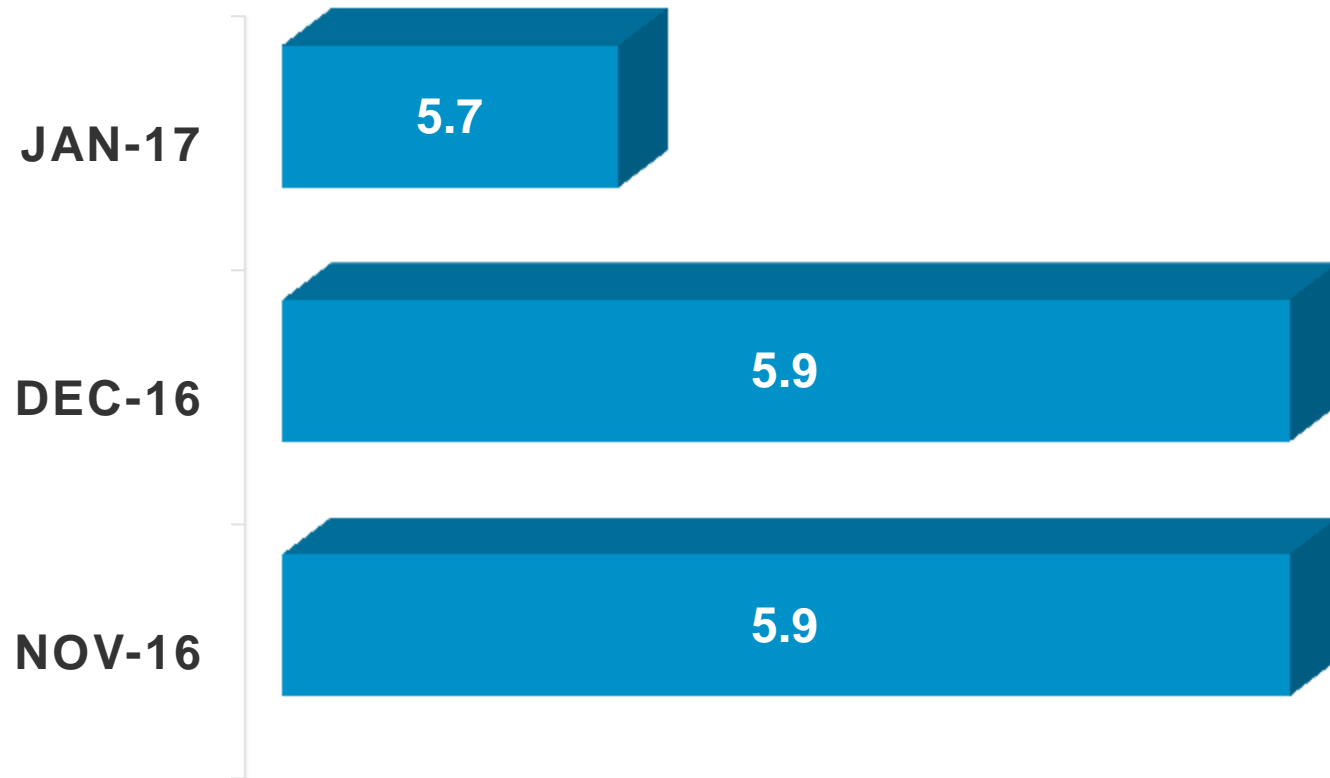
24/02/17 – Merge Event

04/03/17 – Release 33.3

31/03/17 – Release 34

07/04/17 – Pensions Re-Banding

08 & 09/04/17 MOCP Special Event

14/04/17 – Bank Leavers Process

21/04/17 – Pensions Year End

28/04/17 – Release 34.2

26/05/17 – Merge Event, R34.3

23/06/17 – Release 35

Unprecedented demand

Release 34 on the weekend of the 1st April

Could facilitate the agreed 5 events but no more

Will be undertaken over 8th/9th April

Benefit is that the pensions rebanding will have been completed.

IBM will refer any queries from the sender back to the receiver.

Education availability

SHEFFIELD AVAILABILITY AS AT 17TH FEBRUARY

COURSE	START DATE	END DATE	FREE PLACES
Recruitment	7th March	7th March	9
HR	8th March	8th March	5
ESR BI	9th March	10th March	9
Self Service	14th March	14th March	16
OLM	15th March	16th March	14
ESR BI	28th March	29th March	5
Recruitment	11th April	11th April	13
HR	12th April	12th April	13
System Admin	25th April	25th April	16
ESR BI	26th April	27th April	7

Education availability

WARWICK AVAILABILITY AS AT 17TH FEBRUARY

COURSE	START DATE	END DATE	FREE PLACES
Payroll Admin	1st March	2nd March	8
ESR BI	23rd March	24th March	14
Recruitment	28th March	28th March	9
HR	29th March	29th March	9
Self Service	30th March	30th March	11
ESR BI	4th April	5th April	6
Discoverer	6th April	7th April	15
OLM	11th April	12th April	11

NW Service Requests (SRs)
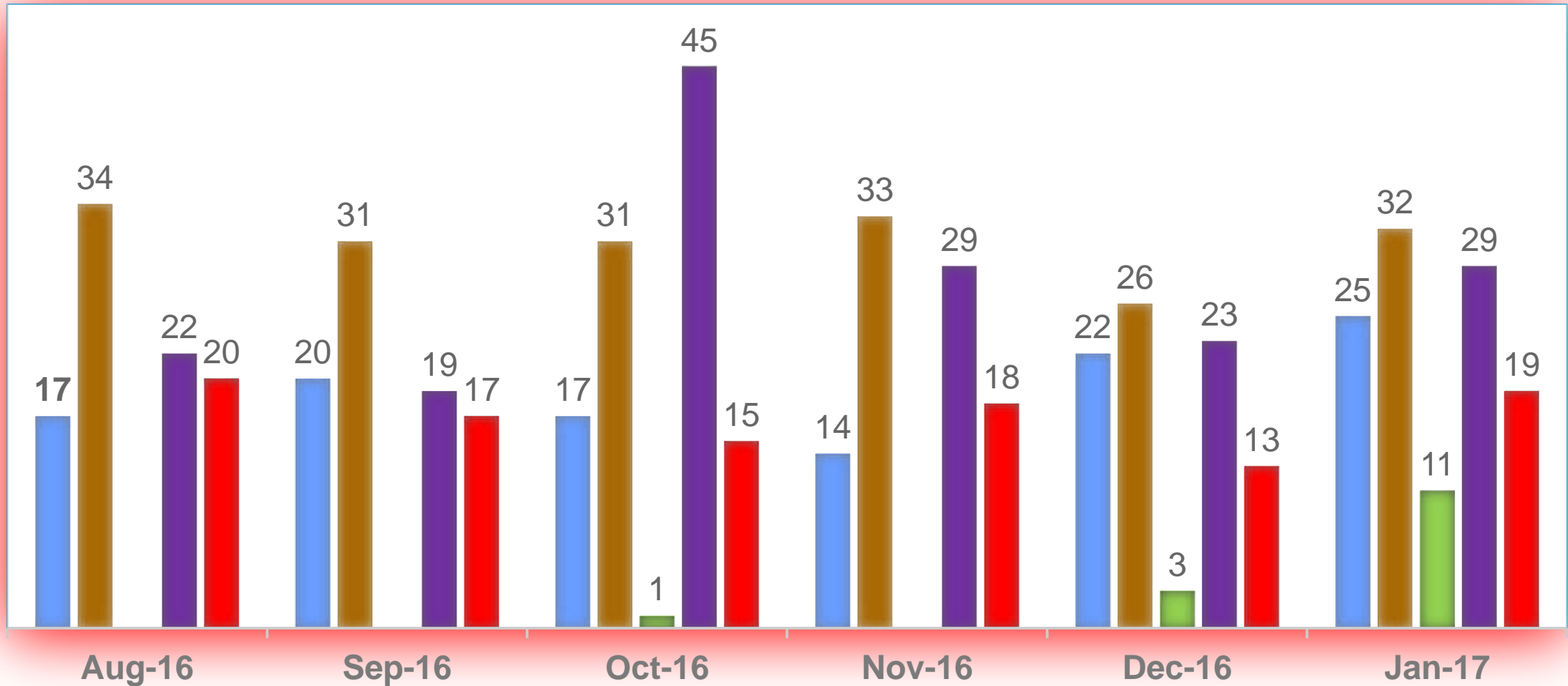
Legend: ■ RTI ■ Pay ■ Pension ■ Print Production ■ Recruitment ■ Registrations

Month	RTI	Pay	Pension	Print Production	Recruitment	Registrations
Aug-16	10	52	8	3	1	
Sep-16	5	72	6	4	2	
Oct-16	10	63	5	6	2	
Nov-16	14	85	4	2	8	1
Dec-16	19	57	1	7	3	2
Jan-17	16	71	6	2	4	2

NW Service Requests (SRs)

NHS

Legend: ■ Absence ■ BACS ■ Discoverer ■ E-Learning ■ ESR

Aug-16: 22, 6, 6, 7, 34
Sep-16: 23, 6, 8, 18, 41
Oct-16: 26, 5, 3, 14, 59
Nov-16: 19, 5, 12, 3, 63
Dec-16: 15, 8, 7, 7, 39
Jan-17: 28, 6, 6, 22, 94

NW Service Requests (SRs)

Legend: SSHR - Administrator, SSHR - Employee, SSHR - Manager, SSHR - Supervisor

	SSHR - Administrator	SSHR - Employee	SSHR - Manager	SSHR - Supervisor
Aug-16	2	5	8	3
Sep-16		9	3	7
Oct-16		12	3	12
Nov-16	2	19	2	8
Dec-16		3	8	3
Jan-17	2	16	3	9
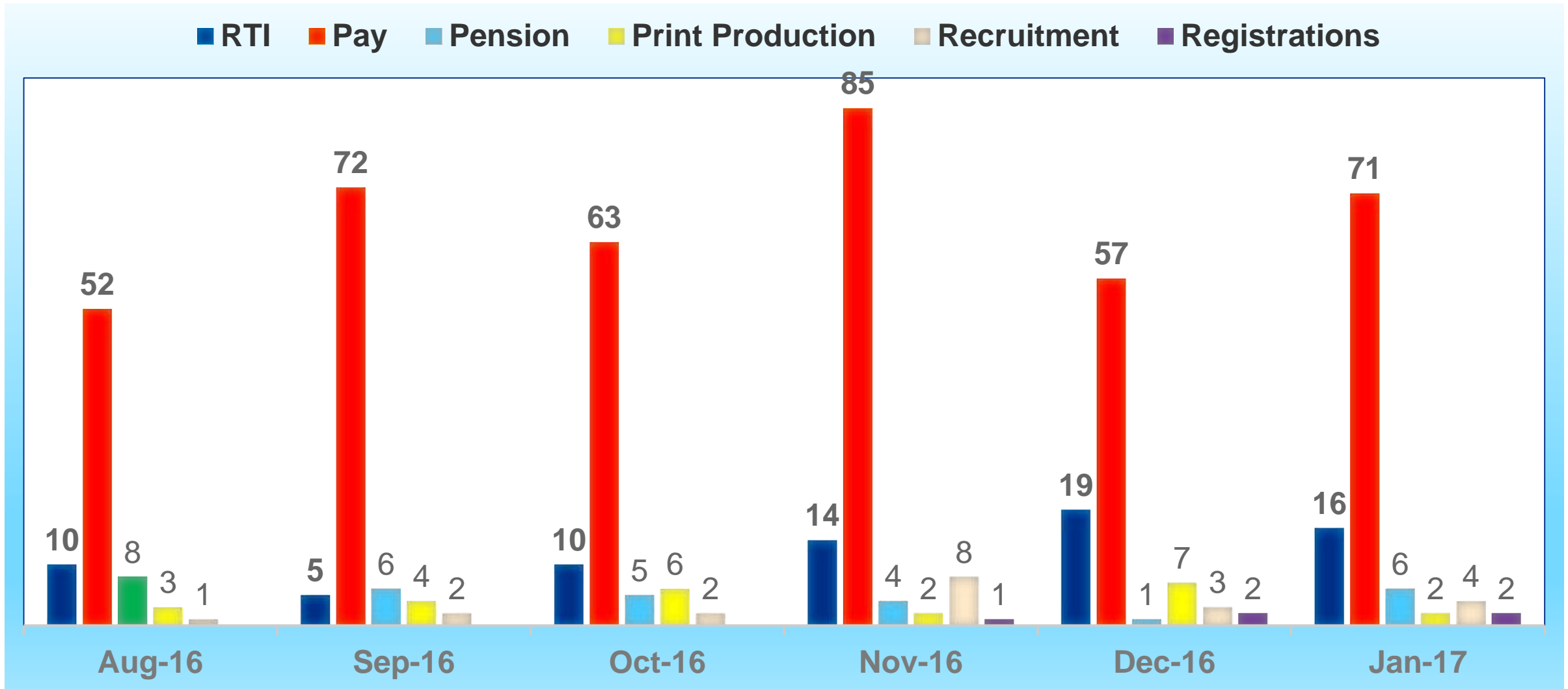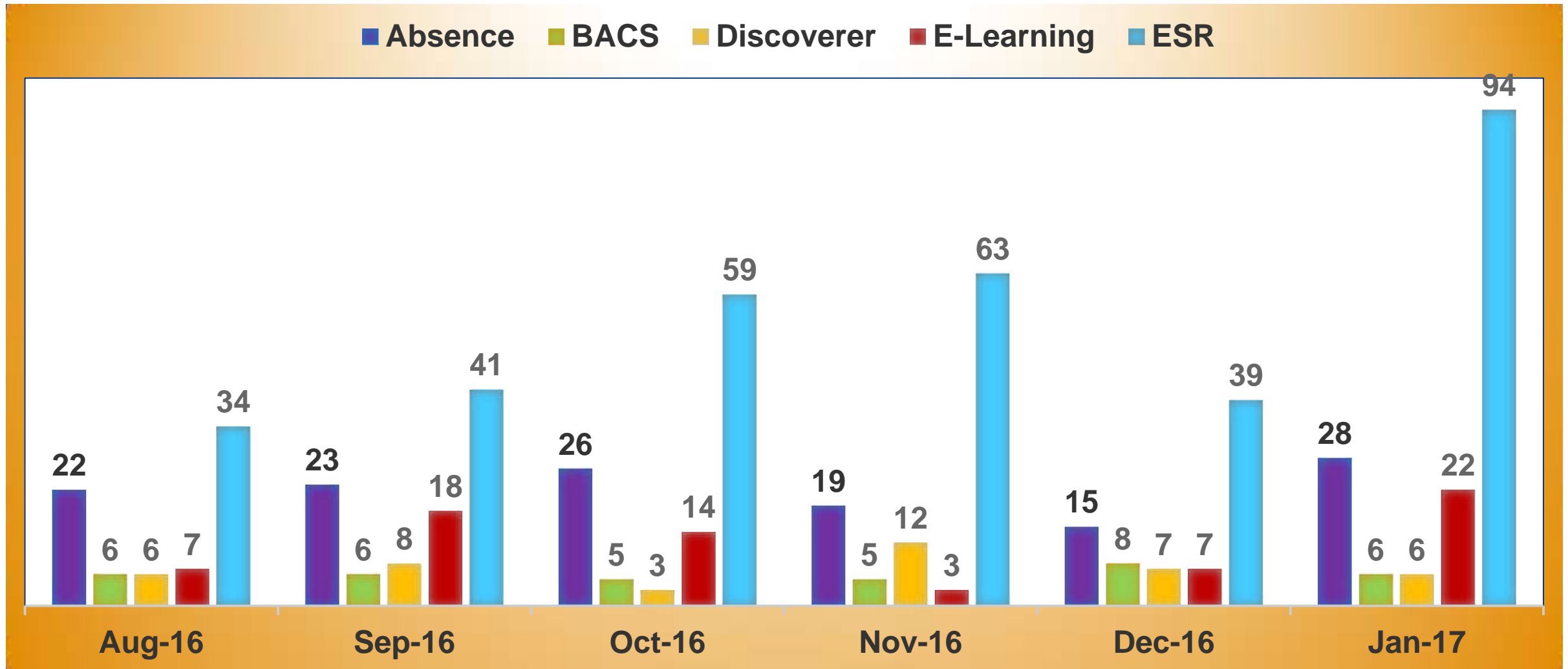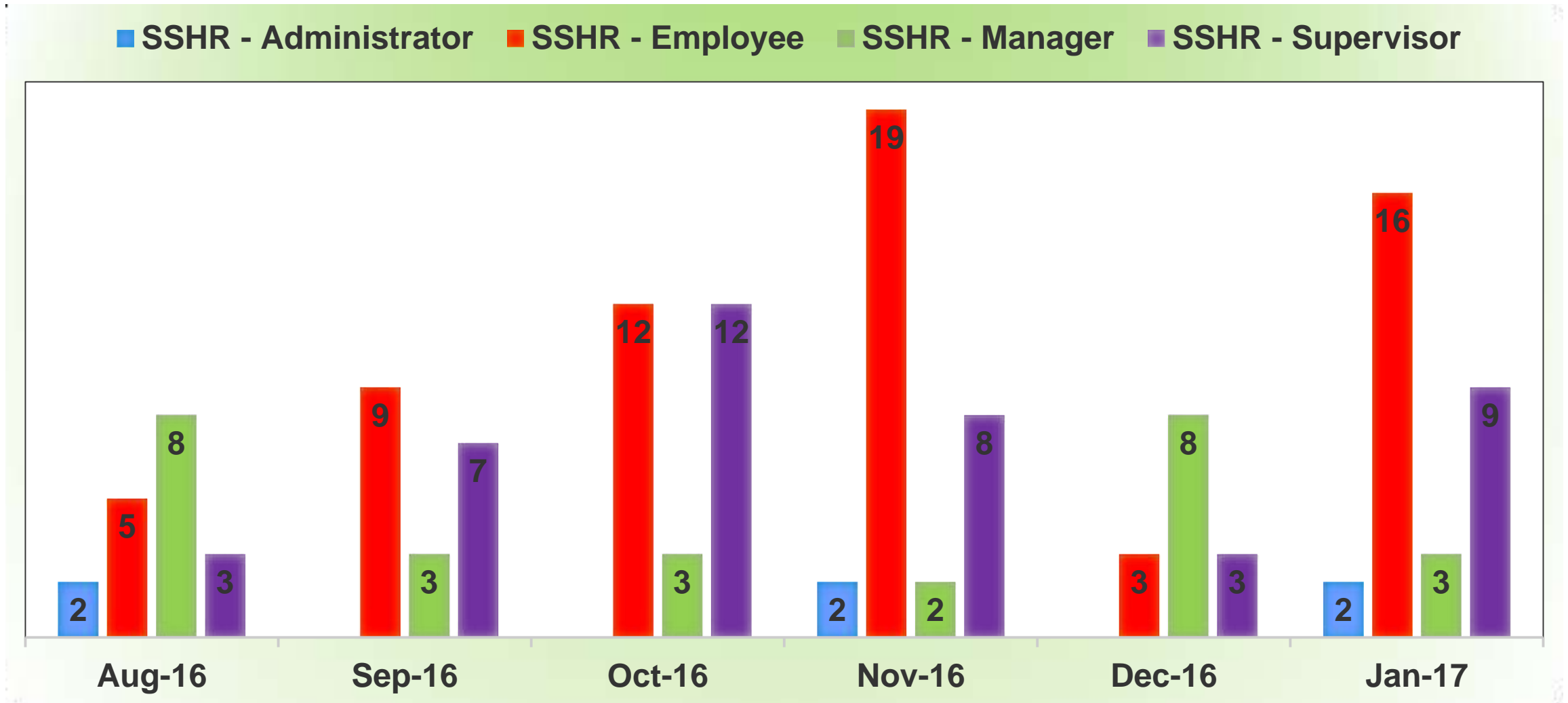
North West SR Volumes over 6 months
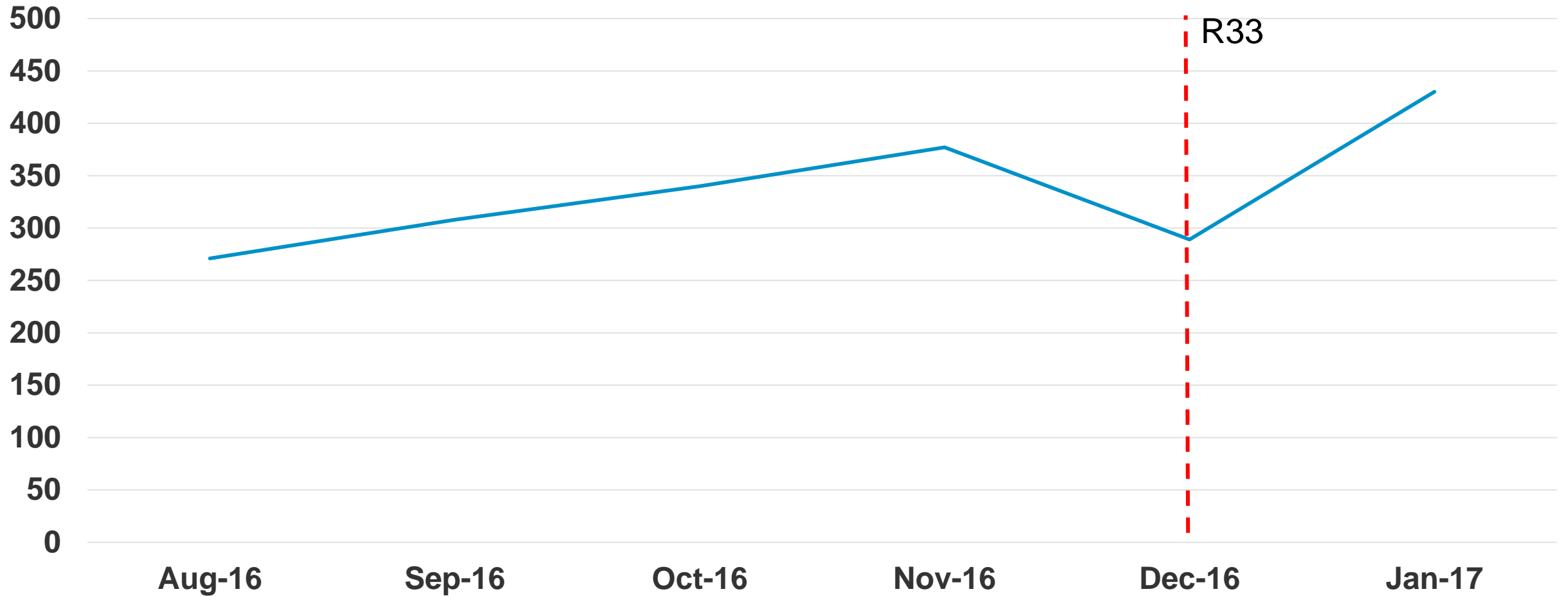
NW Service Requests (SRs)

SR Type	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17
Enhancement	**1**	**1**	**3**	**2**	**0**	**0**
Software	1	1	3	2	0	0
Incident	**170**	**221**	**228**	**265**	**188**	**330**
Database	0	0	0	0	0	1
Network	1	0	3	0	0	1
Process	155	189	171	237	177	277
Software	14	32	54	28	11	51
Query	**59**	**66**	**66**	**70**	**62**	**65**
Process	59	66	64	70	62	65
Software	0	0	2	0	0	0
Work Order	**41**	**20**	**43**	**40**	**39**	**35**
Access Request	1	2	6	3	1	8
Service Addition	24	10	23	28	15	15
Service Alteration	16	8	14	9	23	12
Grand Total	**271**	**308**	**340**	**377**	**289**	**430**

- **Use the escalate facility in Service Desk**

- **Allow Support 24 hours from escalation**

- **Escalate to me if no response or not happy with response.**

- **I have access to SRs and can see where it is and what the delay is.**

- **I can escalate within the Support Team**

- **1ˢᵗ Line = Simple query/issue**

- **2ⁿᵈ Line = More complex issue requiring detailed investigation**

- **3ʳᵈ Line = Possible issue needing config changes to the system**

- **Don't think someone else will raise the SR**

- **Check the KEL on Infopoint**

- **Raise an SR with correct priority**

- **Follow the correct process**

- **Do not change the subject heading**

- **Use your CRM – it's why we are here**

Thank You
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07979 708130

It's your ESR

HEE NW – Strategic Overview

- HEE are currently undergoing a functional review across a range of key functions for 2017/18 faces an operating cost reductions of 20% and a further phased reduction in education support costs of 30% as a result of the Comprehensive Spending Review (CSR).

- The other Arms Length Bodies (ALBs) – NHE England, NHS Improvement, Public Health England, CQC and NICE have similar challenges

- Rationalisation of programmes of work and individual projects has meant additional scrutiny on the outputs and the benefits need to be more closely aligned to the organisations mission

- HEE NW (and its predecessor organisations) recognises the excellent work, collaboration and outputs from the NW ESR BIG SIG network to develop ESR

What does this mean for the NW SIG Network?

- With the financial constraints, 4 meetings a year hosted at Haydock may no longer be affordable at annual costs of circa £20k

- HEE have managed to secure £10k to support the BIG SIG which will be allocated for 2017/18 to a willing NHS provider (as agreed by the NW ESR RUG) host to administer the meetings throughout 2017/18. At the moment this allocation is non-recurrent due to the financial pressures outlined above.

- To fit in with the ESR development schedule - if 4 network meetings are needed – then the group need to look at how they can deliver what is required within the allocation including the venue, the numbers, the frequency, the facilities, provision of lunch and other elements that add to the costs. In 2016, the average cost of one BIG SIG was circa £4.5k

The Practicalities & Next Steps

Administration of the network will have to come from another resource on a rota basis within the network including:

- Management of network list
- Sourcing venues
- Managing invites
- Managing the limited funds

Next steps

- Future proposed dates #TBC
- Network Admin volunteers
- Venue suggestions
- Close NHS Networks group

- Response to Emma Hood no later than 31.03.17. If no responses or volunteers received HEE NW can only commit to supporting/providing admin for 1 event in 2017/18