

# OVERVIEW: YORKSHIRE & HUMBER ESR SELF SERVICE EVENT

Due to the increasing interest from the region the Yorkshire and Humber Special Interest Group held a Self Service Event, to enable users to share experiences of implementing ESR Self Service, lessons learned, resources required and the benefits. One of the key aims of the day was to demonstrate how ESR Self Service use can be varied to meet the needs and key drivers of Trusts, it isn't implemented in exactly the same way in all organisations.

## Event

The morning of the event showcased presentations from 5 Trusts which have implemented different elements of Self Service:

- Employee Self Service (Limited Access)
- Supervisor Self Service
- Manager Self Service

Following the presentations there was an opportunity to ask questions in groups in the form of 'speed dating'.

The afternoon focussed on key Self Service functionality including appraisals in Self Service and Business Intelligence (BI) reports available via Self Service.

60 people attended on the day which represented 23 Trusts. The attendees included HR, Learning and Development, Workforce Information and Payroll colleagues.

The event was kindly supported by Health Education Yorkshire and the Humber and hosted at Barnsley Hospital NHS FT. There was a Twitter hashtag for the day too - **#YHSelfServiceESR**

## User Presentations

The following shows a high level outline of the presentations from users at the event.

**Sherwood Forest Hospitals NHS Foundation Trust – Lauren Tilstone**

### Overview

Sherwood Forest Hospitals NHS Foundation Trust implemented Employee Self Service (LA) in May 2014, with 1100 employees being given access. The aim was to give staff ownership of their information. Overall staff have been positive about ESR and the functionality. This trust are now implementing Supervisor Self Service.

### Key Benefits

- Mandatory Training saw an increase of 4% by November 2014.
- Improved data quality particularly mandatory training and equality and diversity data.
- Enabled easy access to Total Reward Statements (TRS)

### Top Tips

- Removing paper forms for address changes and phone numbers ensures that maximum benefits can be achieved. A small number of staff need support and do come into the office to make the changes so support needs to be provided in the early days.
- Constant communication is needed to encourage uptake.



## Rotherham Doncaster and South Humber (RDaSH) – Louise Bodsworth

### Overview

RDaSH Implemented Supervisor and Employee Self Service across the organisation. Having initially rolled out Supervisor Self Service to enable absence recording, appraisal and personal details changes they have, more recently, introduced the Compliance Matrix and BI reporting.

### Key Benefits

- Reduction in average time to enter absence by 20 days therefore more accurate information.
- Central appraisal reporting, previously databases maintained in departments so no central overview.

### Top Tips

- Create intranet pages with links to user guides and captivate sessions.
- Have the ability to view screens when someone calls for support saves a significant amount of time. (Ask your IT department for this)



## Bradford Teaching Hospitals NHS Foundation Trust – Simon Gardiner

### Overview

Bradford Teaching Hospitals Implemented Supervisor and Employee Self Service over an 18 month period, primarily to allow managers to view employee absence, training and appraisal data. BI reporting is a key element of this, all managers trained are shown 3 key dashboards (absence, compliance and staff requirements). For the managers who need to view a more extensive range of reports a specific training session is provided which shows all the BI reports available.

### Key Benefits

- Reduction in the number of adhoc reports requested through the central workforce information team.
- Easy access to Total Reward Statements (TRS) for Employees.

### Top Tips

- The Trust has made Supervisor name mandatory on starter/change forms so hierarchy is maintained as far as possible by HR when forms are processed.
- Have at least one competent user in each division to act as a central point of contact.





## Bradford District Care Trust – Simon Froude

### Overview

Bradford District Care Trust Implemented Manager, Administrator and Employee Self Service over an 18 month period across the organisation covering a wide geographical area. Self Service is used for assignment changes, absence management (sickness & annual leave), recording appraisal dates, training management and real-time BI reporting.

### Key Benefits

- Fewer payroll errors
- Improved data quality
- Central data entry reduced

### Top Tips

- Need to work with Payroll / Training & Development / HR central services to be successful
- Ensure notifications are managed well

## St Helens & Knowsley Teaching Hospitals NHS Trust – Mike Winstanley

### Overview

St Helens & Knowsley Teaching Hospitals NHS Trust completed Manager Self Service rollout in August 2009. Manager Self Service is used for assignment changes, absence management (sickness & annual leave), recording appraisal dates, booking onto training courses and maintaining personal information.

### Key Benefits

- Accurate and timely information
- Reports in real time – i.e. sickness absence reporting (Flu Pandemic & Stress) means things can be picked up quickly, any trends identified and implement any intervention strategies
- Referrals direct to Occupational Health & return to work dates can be recorded.
- Efficiencies in administration & productivity
- Empowering managers & employees

### Top Tips

- Maintain a positive message of why we are doing it, benefits to the trust, benefits to managers and the staff
- Training is key to successful implementation

### Appraisals

A key driver for implementation of Self Service is the ability to electronically record appraisals, an overview of the appraisals and Performance Management Plans (PMP) was given to the attendees and a preview of the reporting that is now available following release 26 (March 2015).

A webinar is available on the following [link](#).

### BI

Throughout the morning presentations both Supervisor Self Service users and Manager Self Service users highlighted the use of BI reports as being a key benefit to managers. The afternoon session allowed users to see examples of the many dashboards available to managers, including absence, compliance, staff in post and employee dashboard. There was also a demonstration from St Helens & Knowsley Teaching Hospitals NHS Trust given by Steven Roberts of a dashboard that he has created which gives Manager Self Service users all the key information they need to view regularly in one dashboard.

More details on the BI dashboards available can be found here: [link](#)

### Next Steps

The Y&H SIG have agreed to give a dedicated period of time to the standard agenda to allow more time for Self Service discussion and sharing of experiences, so that the relevant Self Service leads that may not have previously attended the SIG can join the meeting at this point.

An eWIN group had been set up to enable the region to share documents and use the discussion forum to support each other between the SIG meetings. This group can also be used to share future meetings, events, agendas and minutes.

## eWIN [ESR Community](#)

### [Yorkshire and Humber ESR Group](#)

Created: Mon, 5 Jan 2015

Yorkshire and Humber ESR Group for Y&H ESR SIG members and/or other ESR Leads/support staff

Several trusts have arranged follow up meetings with Kim Reynolds ESR Account Manager to discuss Self Service with colleagues within organisations and plan to roll out service over the coming months.

For more information please contact your **NHS ESR Account Manager**

ESR Account Manager [link](#)

