# RESORCES

A Guide to Self Service and the ESR Portal

The Benefits of Self Service

The Self Service capability within ESR enables employees to access their personal data through an easy to use browser-based interface that can be accessed in the workplace, at home or on the move via an internet connection on a mobile device. With two levels of access Self Service is the gateway to allowing your employees to have greater ownership of their personal information; this helps organisations reduce costs on admin based tasks and supports local strategies around compliance, engagement, and wider productivity and efficiency plans.

Benefits include:

- Reduce costs by utilising the online payslip and P60 functionality so all your employees can see their payslip and P60 in Self Service (this includes accessing it in pdf format)
- Your employees are empowered to manage their own data; they can view and amend their personal data, including address, phone number, next of kin, and their bank details
- The portal landing page is the gateway into ESR Self Service for all employees and managers, acting as a one-stop shop for workforce related information
- From the portal your employees can access a range of portlets that display information that is important to them
- As well as a full suite of national portlets, you have the ability to develop your own portlets to meet the needs of your organisation
- Little training or support is needed to use Self Service. It has been designed to be intuitive and new portlets from the landing page giving employees and managers the ability to see key information as soon as they log into ESR
- Ability for organisations to set Automatic Internet Access for all their workforce, thereby allowing all their ESR users to automatically access their ESR portal remotely, enhancing the usability of ESR and promoting 24/7 access
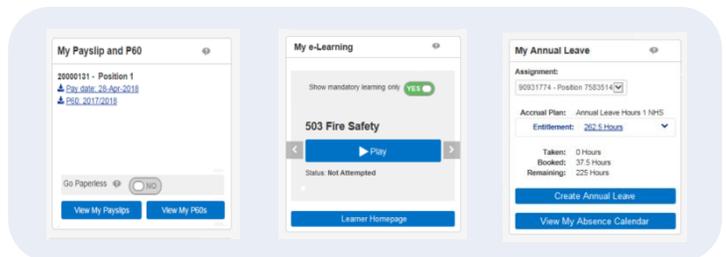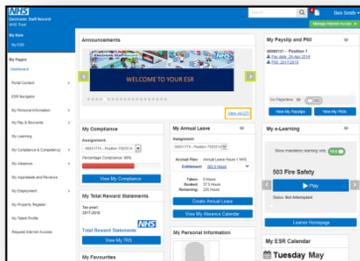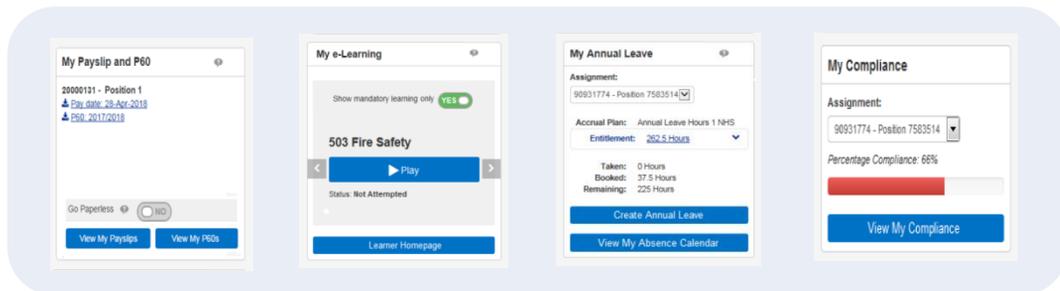
To learn more about the ESR functionality available to your team, obtain best practice guides for implementation or for information about your current usage, please contact your NHS ESR Account Manager or ESR Functional Advisor. As well as guide you through the functionality and provide you with essential system information, they will also undertake your Annual ESR Assessment, providing you with an in depth analysis of how you are utilising ESR, and highlight the potential for expanding your use of ESR.

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ESR Portlets

The ESR portal displays important information to your employees and managers through a wide range of portlets and dashboards.

Portlet	
Announcement	The ability to create announcements and to target them to sections of your workforce
My Payslip	Instant access to current and previous payslips within the organisation
My TRS	Instant access to Pension statements and local benefits information
My Personal Information	The ability to view and update personal information, protected characteristics, and bank account details
My Annual Leave	The ability to view annual leave entitlements and balances (and request, with full ESS)
My Compliance	The ability to view learning compliance based on position requirements
My e-Learning	Instant access to 'play' e-Learning and access other learning through the learning homepage button
My ESR Calendar	Provides useful reminders for course bookings, expiry dates for registrations, fixed term contracts etc.
Managers Dashboard	The ability to view key performance indicators for absence, compliance, and appraisals with direct links to these areas and the ESR Business Intelligence (BI) reports directly from the portlets

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Self Service for Applicants

The deployment of Self Service at a pre-hire stage for applicants enables you to empower your applicants to manage their own e-Learning prior to their start date. ESR can generate an ESR user account automatically at 'Offer Accepted' stage in the recruitment process. Once generated the applicant can access ESR to view planned classroom training and to enrol or undertake required training at their convenience as an applicant, thus enabling the applicants to work towards training compliance prior to their start date, thereby streamlining the on-boarding process.

Manager Self Service

The implementation of Managers Self Service provides managers with not only their own Employee Self Service view, but also access to a vast array of information on their teams, with the additional benefits of the ability to act upon the information directly into the system. The solution provides a choice of five levels of access for managers, to enable the organisation to respond to different roles and responsibilities within the organisational structure. Within these levels there are a wide range of benefits available, including the ability to :

- Empower your managers to have greater control of their workforce data and targets
- Choose between 'Payroll Approvals Required' or 'Not Required' should you require an extra level of governance/approval
- View key performance indicators for absence, compliance, and appraisals on the Manager Dashboard with direct links to these areas and the ESR BI reports directly from the portlets.
- Reduce costs by utilising the online payslip functionality so all employees can see their payslip and P60 in Self Service
- Support the career development of their team via learning paths, qualifications, competencies and development reviews
- Undertake online appraisals and nurse revalidation reviews, and cascade objectives using the appraisal functionality
- Access key career information about their employees through the Talent Profile, with the ability to produce PDF reports
- View upcoming events for employees, e.g. appraisal dates, annual leave, learning events and expiry dates (fixed term contracts, professional registrations, etc.) from a dedicated portlet
- View a colour co-ordinated absence calendar to identify absence patterns and view all staff absences
- Enable authorised users to make changes on their behalf using proxy access
- Enter data once at the closest point to its source thereby improving accuracy, quality, and timeliness of information available
- The ability for employees to instigate their own termination on ESR, to thereby encourage the timely processing of leavers to reduce the risk of overpayments.
- Access a visible representation of the supervisor hierarchy from your direct reports onwards, down the hierarchy through the organisation chart portlet, with additional functionality to perform changes directly to employees record from within the portlet.

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Administrator / Supervisor Self Service

Administrator Self Service allows administrators to perform data entry on behalf of managers. This gives the organisation more flexibility when implementing Self Service. When setting up Administrator Self Service the Administrator has to be entered in the hierarchy, above all those employees that they will be responsible for maintaining. The Administrator does not have to sit directly below a manager in the hierarchy as approvals are controlled using the Manager Tick Box on the assignment form on their employee assignment ticked; this can be found under the Miscellaneous tab. This means that the Administrator can act on behalf of managers both above and below them in the supervisor hierarchy but with approval going to the manager of the employee on which the change was made.

Benefits include:

- **Administrator Self Service** allows your administrators to view and update employee information on behalf of a manager or supervisor. Any changes which are pay-impacting (e.g. assignment changes, end employments, new hires) are forwarded to a Manager Self Service user for approval. There is also the option of choosing between 'Payroll Approvals Required' or 'Not Required' should you require an extra level of governance/approval.

- **Supervisor Self Service** is a subset of Manager Self Service. This enables your supervisors to view employment information but does not give them the ability to make assignment changes. Supervisor Self Service gives your supervisors the ability to view and update personal information (including absence, personal details and property register details) and to manage careers (including learning, suitability matching, competencies, qualifications, registrations and appraisals). More than one supervisor can be defined for an employee's assignment.

Proxy Access / Multiple Supervisors

The Manage Proxies functionality can also be used to allow managers to delegate access to one or more proxy users. The delegator can grant access to specific Self Service responsibilities to the proxy user. The delegator can see actions carried out by the proxy user by running a proxy report.

When changes are made by a proxy user, the NHS Employee Change Event Dashboard will report the name of the user that has delegated the access as the person making the change and not the proxy user.

Multiple Supervisors is functionality which gives you greater flexibility within your larger teams or where managers work across 24/7 shift patterns as well as assisting with job shares.

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