


# ESR

## Extending the Benefits Project

Implementing  
Supervisor Self-Service  
for AfC  
managers/supervisors



- What is ESR?
- Why implement supervisor self-service?
- What will managers/supervisor be able to do?
- Implementation steps for you
- What will you see & do – the detail?



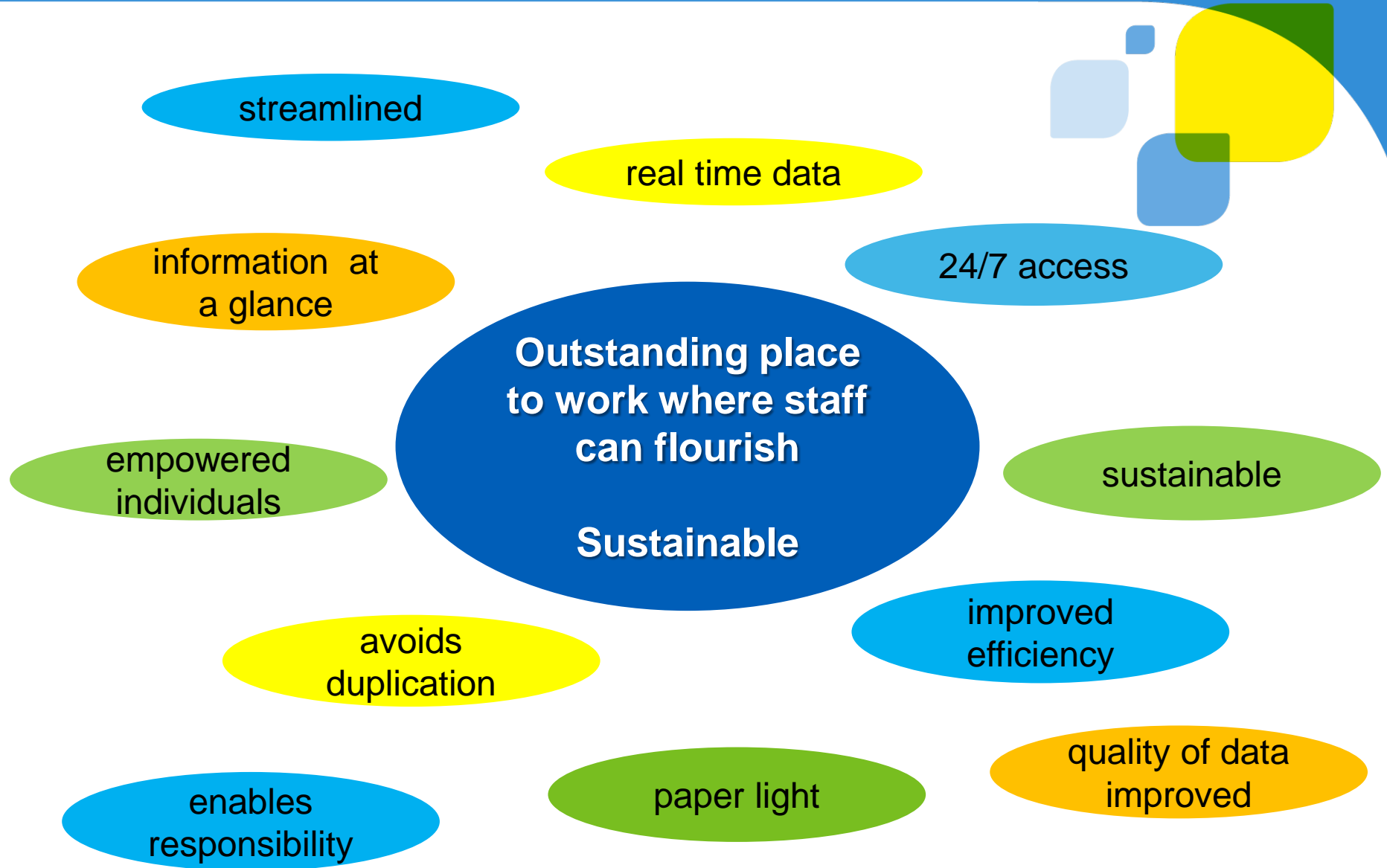
The Electronic Staff Record (ESR) system is a national web based system used by 1.4 million staff in the NHS.

It holds all our personal information and it is the system that manages our pay.

It interfaces with other systems (eg roster system, pensions) sending and receiving information.

It is the primary data source for NHS staff information – NHS improvement use it for eg Model Hospital, CQC

It has 'self service' modules enabling the user to manage their own information which can be put in at source, enabling the streamlining of information (accuracy, quality, timeliness).



# Supervisor self service enabling you to view and manage your staff information.

## Personal information

- ✓ view your team members address, emergency contact details and more

## Appraisal

- ✓ Record appraisal dates directly into ESR & upload completed appraisal documentation
- ✓ Monitor your teams appraisal activity
- ✓ Keep track of your compliance

## Pay progression

- ✓ Manage the pay progression process and enable your staffs pay step progression

## Notifications

- ✓ Receive reminders to your in box for appraisal, fixed term contract, professional registration, revalidation, pay progression, Right to Work, absence triggers

# Roll out of ESR supervisor self service

- **no training is required and the time commitment from you is minimal**
- Most of you will have already heard about ESR supervisor self-service. This slide pack will help as a reminder.
- Roll out of supervisor self service for remaining teams is June – Dec 2020
- We are rolling out by directorate group over a 4 week period (full rollout schedule is available)
- You will be supported by HRBP team (deputies) and speciality manager
- The next slides walk you through your 4 week implementation plan



## What will roll out of ESR supervisor self service mean for me?

### **Week 1:**

We will send out an email to collect your supervisor information (who line manages who in your team) from your matron and speciality manager or department head. This is the supervisor hierarchy. You may be asked to supply some of this information.

### **Week 2/3:**

The supervisor hierarchy information is returned and we input into ESR to set up your team(s) supervisor hierarchy.

### **Week 4:**

You will be notified that you are live with supervisor self-service and advised next steps and the resources available to help you.

### **Ongoing:**

Utilising supervisor self service and notifying us of any changes in your hierarchy.

# Manager/supervisor dashboard

We are starting by rolling out the recording of appraisal dates and managing pay progression for your staff.

You can view personal information such as home address and contact details for your team members via your dashboard also.

**NHS**  
Electronic Staff Record  
Royal United Hospitals Bath NHS Foundation Trust

Search... Admin 4

**My Role**  
Manager >

**My Pages**  
Dashboard  
ESR Navigator  
Talent Profile  
Organisation Chart  
My Team Personal Information >  
My Team Career Information >  
My Team Assignment Information >  
Manage Hires  
Reporting >  
Manage Internet Access

**Team Appraisals**

**Team Appraisals**

0% - 60% 60% - 80% 80% - 100%

0% 20% 40% 60% 80% 100%

100.00%

Refresh - Print - Export

**My Team Pay Progression**

**My Team Pay Progression**

**No data**  
Only employees employed or starting a new role after 1st April 2019 will be displayed within this analysis.  
Refresh  
Manage Appraisals

**Team Actions**

**Tuesday July 23, 2019**

In the next 7 days your team have no events.  
View Team Calendar

**Organisation Chart**

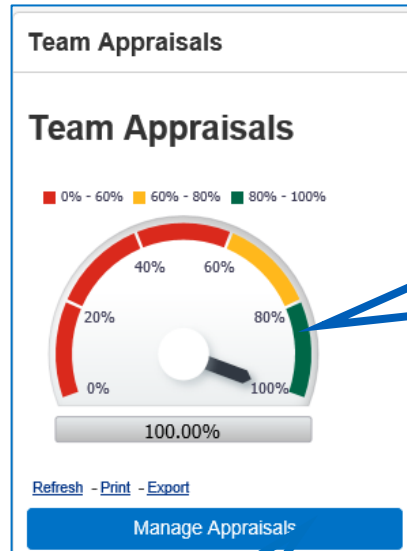
Launch Organisation Chart

<https://my.esr.nhs.uk/dashboard/web/royal-united-hospital-bath-nhs-trust>



# Portlets

- Team Appraisals
- Team Appraisals Cont.
- My Team Pay Progression
- Team Actions
- Organisation Chart



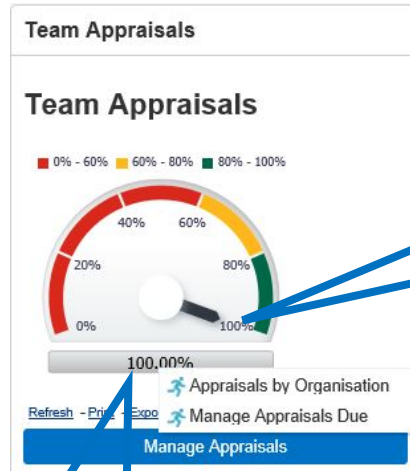
A visual representation of current appraisal compliance for your hierarchy (this includes new starters)

Clicking here will allow you to view existing appraisals within your teams hierarchy, record new appraisal dates & upload completed appraisal documentation. 'How to' guidance will be available to show you how to do this.

The screenshot shows the NHS appraisals system interface. At the top, there is a navigation bar with the NHS logo, search, home, favorites, settings, help, and logout options. Below this, there are three main sections: 'In Progress', 'Completed', and 'Performance'. The 'Appraisals and Reviews As Main Appraiser' section is active, showing a table of appraisals. The table has columns for Initiator, Appraiser, Appraisal Date, Appraisal Status, Appraisal Purpose, Plan, Participation Status, Period Start Date, Period End Date, Download, Select a File, Clear Offline Status, Upload, Print, Details, Appraise, and Delete. The table currently shows 'No results found'.

# Portlets

- Team Appraisals
- **Team Appraisals Cont.**
- My Team Pay Progression
- Team Actions
- Organisation Chart



Shows current compliance within your hierarchy (this includes new starters)

Clicking here will show you two options:  
Appraisals by Organisation & Manage Appraisals Due.  
Clicking on either of these will open up a Business Intelligence (BI) report detailing upcoming appraisals



Group by Organisation and and

Organisation	Assignment Count	Reviews Completed	Reviews Completed %
427 Workforce Team	3	3	100.00
<b>Grand Total</b>	<b>3</b>	<b>3</b>	<b>100.00</b>

Refresh - Print - Export - Add to Briefing Book

Group by Org L1

Org L1	Dec	Mar	May	Jul	Overdue	Grand Total
427 Merged Trust	1	1		1		3
<b>Grand Total</b>	<b>1</b>	<b>1</b>		<b>1</b>		<b>3</b>

Refresh - Print - Export - Add to Briefing Book

\* Show Appraisals Due: Now

Apply Reset

## Appraisals by Organisation

Useful for appraisers who manage staff over multiple areas, this BI report will allow you to see a summary of the compliance at different organisational levels.

Organisation	Assignment Count	Reviews Completed	Reviews Completed %
427 Workforce Team	3	3	100.00
<b>Grand Total</b>	<b>3</b>	<b>3</b>	<b>100.00</b>

## Manage appraisals Due

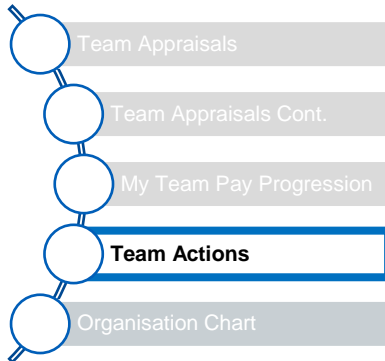
This BI report allows the named supervisor to monitor when appraisals are due for their team. A drop down box can filter this list by Due now, 1 month, 3 months and 6 months

Org LI	Due	1 Month	3 Months	6 Months	Grand Total
427 Merged 1-12	1	1	1		3
<b>Grand Total</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>3</b>

Appraisal#	Lead Name	Excl Name	Review Title	Supervisor Name	Incremental Date	Organisation	Review Type	Appraisal Date	Next Appraisal Date	Status
					01/01/2020	427 Workforce Team	Performance Appraisal	19/12/2019	19/12/2019	In Date

# Portlets



**Team Actions**

**Tuesday July 23, 2019**

In the next 7 days your team have no events.

[View Team Calendar](#)

Summarises any upcoming (next 7 days) date related actions held in ESR for your team eg fixed term contract end, appraisal

Clicking here will allow you to scroll through your ESR calendar to see any upcoming events for your team members



**Calendar**

Calendar

July 2019 Today

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

July 2019

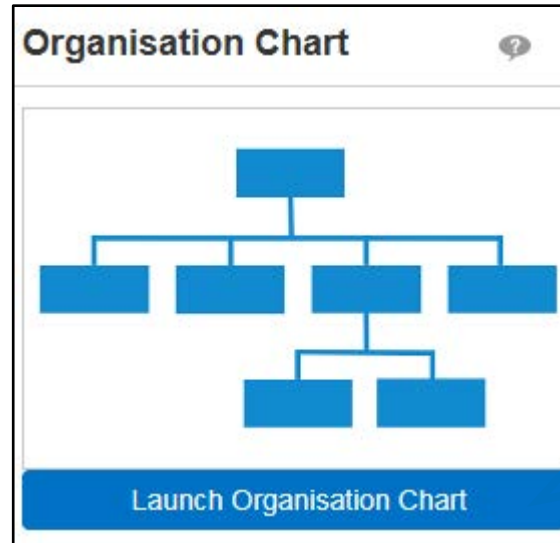
Sun	Mon	Tue	Wed
30	1	2	3
7	8	9	10
14	15	16	17

My Calendars

- Competency Expiry Dat
- Upcoming Class Enrol.
- Appraisals Calendar

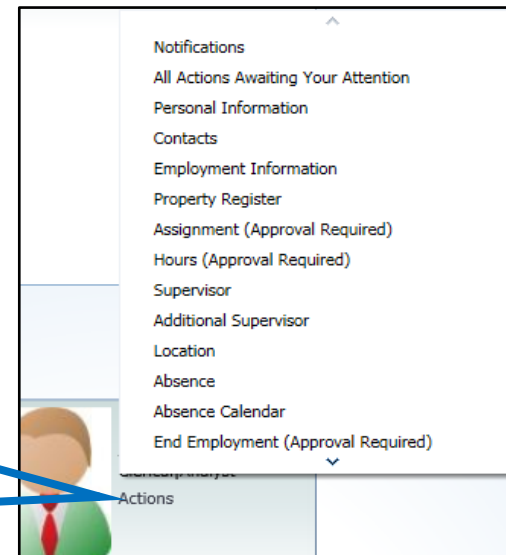
# Portlets

- Team Appraisals
- Team Appraisals Cont.
- My Team Pay Progression
- Team Actions
- Organisation Chart**

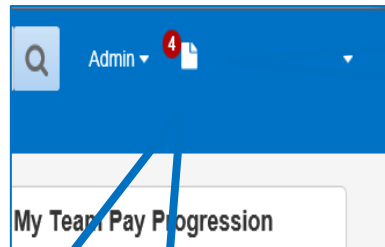


Click to see staff in your reporting hierarchy chart. The information you see depends on how your dept. hierarchy structure has been set up. **Please see note below re: keeping your hierarchy up to date.**

Once your organisation chart is launched click on actions under staff members name to bring up menu and view staff members information directly

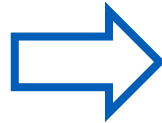


# Notifications

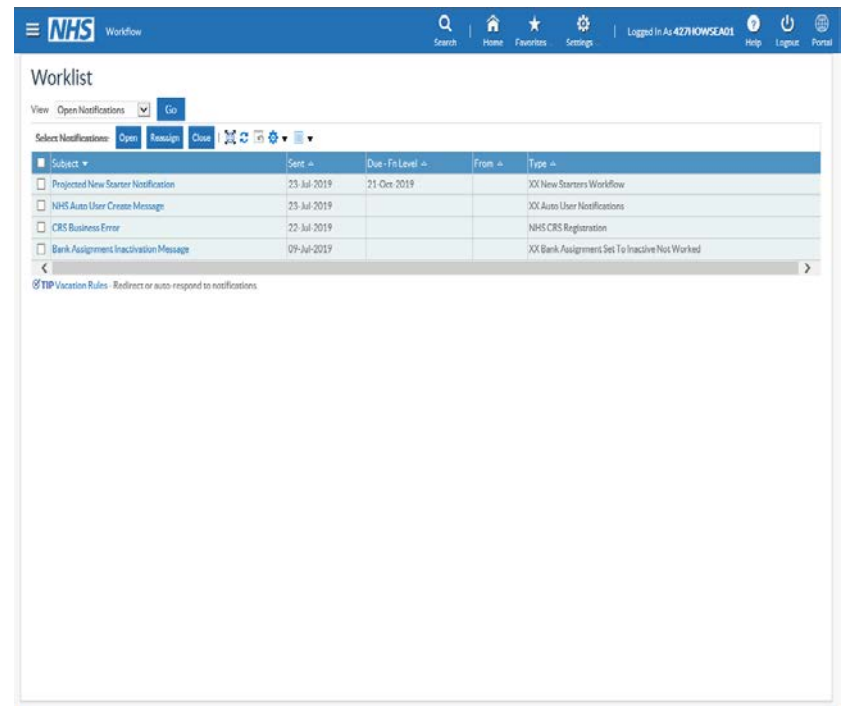



Any notifications will show in the top right hand corner of your manager/supervisor dashboard

Clicking on the icon will give you a list of all your notifications. Most will be for information only but you are required to acknowledge that you have read them



Providing you have an NHS mail address recorded in ESR, notifications will be sent to your 'in box' where you can read/action them.  
A 'How to Guide' is available





If you have any queries regarding the  
implementation of your  
ESR supervisor self-service

please contact  
your speciality manager, deputy HRBP or  
ESR Self-Service

✉ [ruh-tr.esrselfservice@nhs.net](mailto:ruh-tr.esrselfservice@nhs.net)

Thank you