# **ESR HOW TO GUIDE – RECORDING APPRAISAL DATE AND UPLOADING** APPRAISAL DOCUMENT (OPTIONAL)

#### United Hospitals Bath NHS Foundation Trust NHS My Role Electronic Staff Record Royal United Hospitals Bath NHS Foundation Trust Announcements My ESR My Role Click on Did you kr Announcements Manager Manager book class Did you kn Preferences ✓ Check ti My Pages book class Click on My Add boc Dashboard Recruitment ESR ✓ Check tir ✓ Cancel Ł Add hoo 89 NHS Search content Q Electronic Staff Record Royal United Hospitals Bath NHS Foundation Trust My Role Manager 0 0 Team Appraisals Organisation Chart Team Actions My Pages Monday Team Appraisals Dashboard February 10, **0%** - 60% **60%** - 80% **80%** - 100% ESR Navigator 2020 Talent Profile In the next 7 days 1 of your team 💉 have upcoming events. Organisation Chart Launch Organisation Chart 100.00% My Team Personal View Team Calendar > Information <u>Refresh</u> - <u>Print</u> - <u>Export</u> Manage Appraisals My Team Career > Information My Team Assignment > **Click on Manage** Information Appraisals Manage Hires Reporting > Manage Internet Access

## STEP 1 – Accessing the Appraisal section

# STEP 2 – Selecting the individual to Appraise

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### STEP 3 – Entering the Appraisal Details

Review Type:	Select Performance Appraisal from drop down menu
Period Start Date:	Select from the calendar the start date of the retrospective
	period that is being appraised
Period End Date:	Select from the calendar the end date of the retrospective
	period that is being appraised
Template:	Type AfC -> select AfC Development Review from search menu
Appraisal Date:	Select from calendar the date the appraisal took place
Next Appraisal Date:	Enter the next appraisal date (By default this should be no later
	than 12 months from the previous appraisal date)*
Assignment Number:	This is the assignment number of the individual being appraised
Main Reviewer:	By default this will list the individual updating ESR

\*Although this is not a mandatory field, this date is used to generate reminder notifications of upcoming appraisal, so please ensure it is completed.

# STEP 4 – Finalising the appraisal

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# Step 2.1 (Optional) – Uploading the Appraisal Documentation

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#### PLEASE REFER BACK TO STEP 4 TO COMPLETE APPRAISAL INPUT