

# **Electronic Staff Record (ESR)**

Employee Self Service  
& e-Learning

User Guide

# Contents

1. <a href="#">ESR Employee Self Service &amp; e-Learning Login</a> .....	3
1.1 <a href="#">Employee Self Service/e-Learning Homepage</a> .....	4
2. <a href="#">Updating Personal Information</a> .....	5
3. <a href="#">Updating Bank Accounts</a> .....	7
4. <a href="#">Updating Religious Belief and Sexual Orientation</a> .....	9
5. <a href="#">On-Line Payslips</a> .....	10
6. <a href="#">On-line P60s</a> .....	10
7. <a href="#">Notifications</a> .....	12
8. <a href="#">All Actions Saved for Later</a> .....	12
9. <a href="#">View Only Information</a> .....	13
10. <a href="#">Competing E-Learning</a> .....	14
10.1 <a href="#">Accessing e-Learning from Home</a> .....	16
11. <a href="#">Further Assistance</a> .....	16

# 1. ESR Employee Self Service & e-Learning Login

Access to ESR is either by Username and Password or by using a Smartcard.

Unless you are already an ESR user, you will access the system using a Username and Password, which you already have been provided to access e-Learning.

To access ESR with a Smartcard [Click Here](#)

## To access the system with a Username and Password:

Click on the following link: <http://esr.mhapp.nhs.uk>

Enter your username and password



The screenshot shows a login form with two input fields. The first field is labeled '\*User Name' and contains the text '216jsmith01'. Below this field is a small text example: '(example: 999JSMITH01)'. The second field is labeled '\*Password' and contains a series of black dots. Below this field is another small text example: '(example: 4u99v23)'. At the bottom of the form is a button labeled 'Login'.

If you require this information, email [plh-tr.workforcedevelopment@nhs.net](mailto:plh-tr.workforcedevelopment@nhs.net)

If this is the first time you have logged into the system, you will be prompted to change your password. The new password needs to be at least 6 characters long; contain a number and cannot have repeating characters.

If you are experiencing **issues accessing the system**, firstly ensure you have the correct version of JAVA on your PC. For guidance – [Click Here](#)

If you have any problems contact the Workforce Development team on 32112 or [plh-tr.workforcedevelopment@nhs.net](mailto:plh-tr.workforcedevelopment@nhs.net)

## Forgotten Username and/or Password

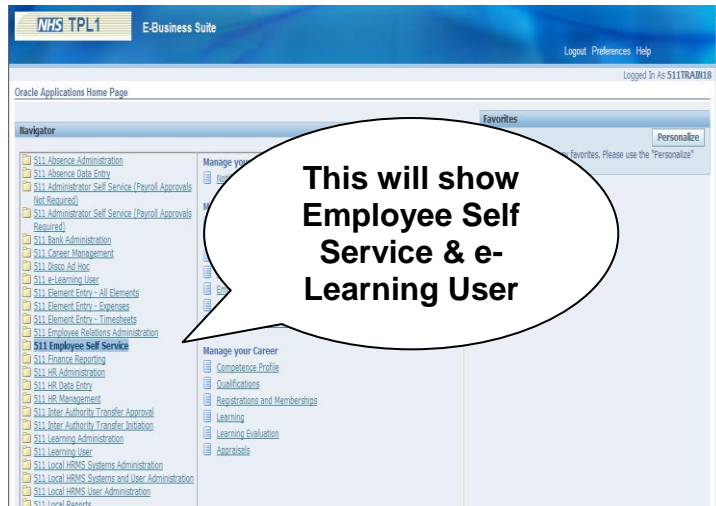
If you have forgotten your Username and/or Password and have a Trust email address, from the login page click on '**Forgotten Username and Password**'

If you know your User Name, enter it into the username field and click the Forgotten Password Button. You will then receive an email with instructions on how to reset your password.

If you do not know your User Name, enter your Trust email address in the Email field and click the Forgot User Name button. You will then receive an email detailing your User Name and instructions on how to reset your password.

## 1.1 Employee Self Service/e-Learning Homepage

Once you have logged into ESR you will be presented with the following screen. On the left hand side of the page you will see the User Responsibility Profiles you have access to, which will be Employee Self Service (Limited Access) and e-Learning



Click on either **Employee Self Service (Limited Access)** or **e-Learning User**



Tip: To return to this screen at any point click **home**

## 2. Updating Personal Information

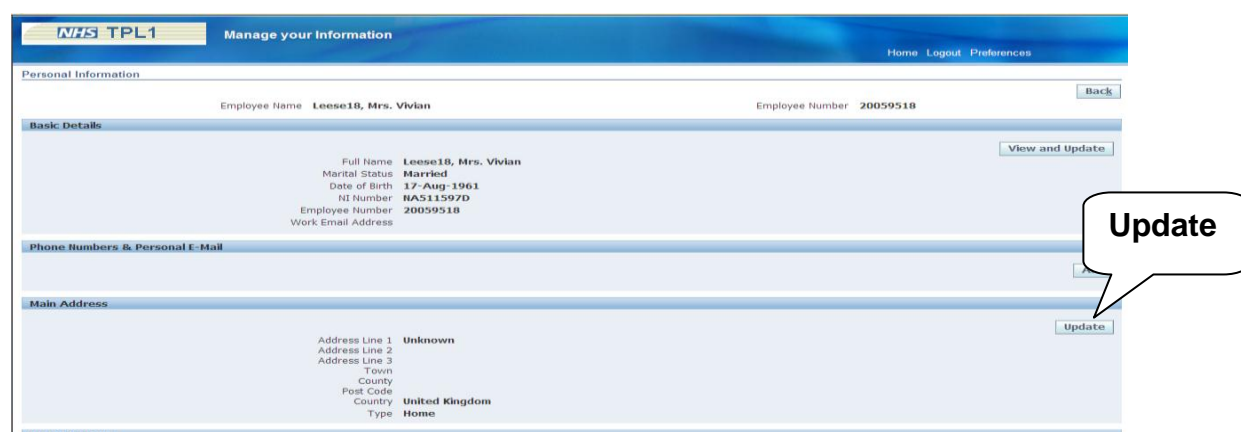
The personal information section allows you to view and amend your personal details. The following information can be updated:

Phone Numbers & Personal E-Mail  
Main Address  
Other Address  
Emergency Contacts  
Dependents and Other Contracts

From the **Home** page click on **Employee Self Service (Limited Access) > Personal information**

The following example demonstrates how to amend an address; the same process is used to change the other details.

In the **Main Address** area select the **Update** button



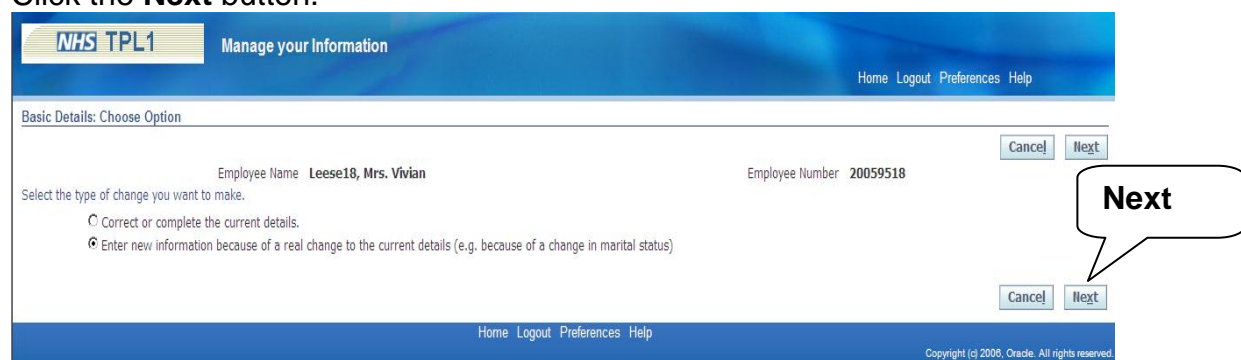
The screenshot shows the 'NHS TPL1 Manage your Information' interface. The 'Personal Information' section is active, displaying details for 'Leese18, Mrs. Vivian' (Employee Number: 20059518). The 'Basic Details' section includes fields for Full Name, Marital Status, Date of Birth, NI Number, Employee Number, and Work Email Address. The 'Main Address' section is highlighted, showing fields for Address Line 1-3, Town, County, Post Code, Country (United Kingdom), and Type (Home). An 'Update' button is visible next to the 'Main Address' section, with a callout bubble pointing to it.

Click the button to select the type of change you would like to make.

**Correct or amend this address** will correct the existing information.

**Entering a new address if you have moved** will add new information.

Click the **Next** button.



The screenshot shows the 'NHS TPL1 Manage your Information' interface. The 'Basic Details: Choose Option' dialog box is displayed, asking the user to select the type of change they want to make. The options are: 'Correct or complete the current details.' (radio button) and 'Enter new information because of a real change to the current details (e.g. because of a change in marital status)' (radio button, selected). The 'Next' button is highlighted with a callout bubble. The 'Cancel' and 'Next' buttons are visible at the bottom right of the dialog box.

Update the details as necessary then click **next**

The screenshot shows the 'Main Address: Enter New Address' form. At the top, it says 'NHS TRD2 Manage your Information' with links for 'Home', 'Logout', 'Preferences', and 'Help'. The employee name is 'Mistry, Mr. Sandeep' and the employee number is '20091965'. The form asks for the effective date (18-Dec-2006), type (Home), country (United Kingdom), address lines (27 Apple Grove), town (Warwick), county (Warwickshire), and post code (CV34 7JT). There are 'Cancel', 'Save For Later', 'Back', and 'Next' buttons at the top and bottom. A speech bubble with the word 'Next' points to the 'Next' button.



Tip: There is also an option to **save for later**, you can use this option if you are part way through a change and do not have time to complete it. (For more information on actions saved for later, [see section 8](#))

The following screen allows you to review the changes.

The screenshot shows the 'Personal Information: Review' page for 'Leese18, Mrs. Vivian'. It displays a comparison table between 'Current' and 'Proposed' information. The 'Proposed' column has a small 'o' icon next to several items, indicating they are changed. Below the table is an 'Attachments' section with a 'None' button and an 'Add' button.

Current	Proposed
Effective Date 07-Nov-1995	20-Jan-2011 o
Title Mrs.	Mrs. o
Full Name Leese18, Mrs. Vivian	Leese18, Mrs. Vivian Gemma (Viv) o
First Name Vivian	Vivian o
Middle Name	Gemma o
Last Name Leese18	Leese18 o
Preferred Name	Viv o
Previous Last Name	Rockford o
Employee Number 20059518	20059518
NI Number NAS115970	NAS115970
Date of Birth 17-Aug-1961	17-Aug-1961
Marital Status Married	Married
Work Permit/Sponsorship Required No	No
Ethnic Origin 1 Black-Caribbean	1 Black-Caribbean
Country of Birth Guyana	Guyana
Nationality British	British

If the changes are correct click **submit**, if not click **back** and amend the errors.

### 3. Updating Bank Accounts

The Bank Accounts section allows you to add, change and remove the bank account your salary is paid into.

From the **home** page click on **Employee Self Service (Limited Access) > Bank Accounts**

NHS TPL1 Manage your Information Home Logout Preferences

Manage Payroll Payments: Define Payments

Employee Name **Leese18, Mrs. Vivian** Employee Number **20059518**

Use these pages to specify how you wish to be paid. Click Continue to proceed to submit your changes or Cancel to return without change.  
\* Indicates required field

**Employee Payments**

Amount Type	Amount	Priority	Delete	Update
Remaining Pay		1		

**TIP** Payments will be made in the order listed up to the value of Pay only. Where the next payment type exceeds remaining pay then only the outstanding amount of Pay will be processed. Any payment types remaining after Pay has been allocated will be ignored.

Home Logout Preferences Copyright (c) 2008, Oracle. All rights reserved.

To update your bank details click on the **update** icon.

NHS TRD1 Manage your Information Navigator Favorites Home Logout Preferences

Update Bank Payment

Employee Name **Steele, Kerry** Employee Number **20000813**

\* Indicates required field  
 **TIP** This payment is used to handle any pay remaining after all other payments have been made.  
 **TIP** Please take care to ensure that you enter all information correctly, and that any new or updated information is entered in time for the next payroll pay date. Entering incorrect information or updates after the payroll has been processed may result in payment delays. If you are in any doubt please contact your payroll department for advice.

Payment Method **298 BACS**

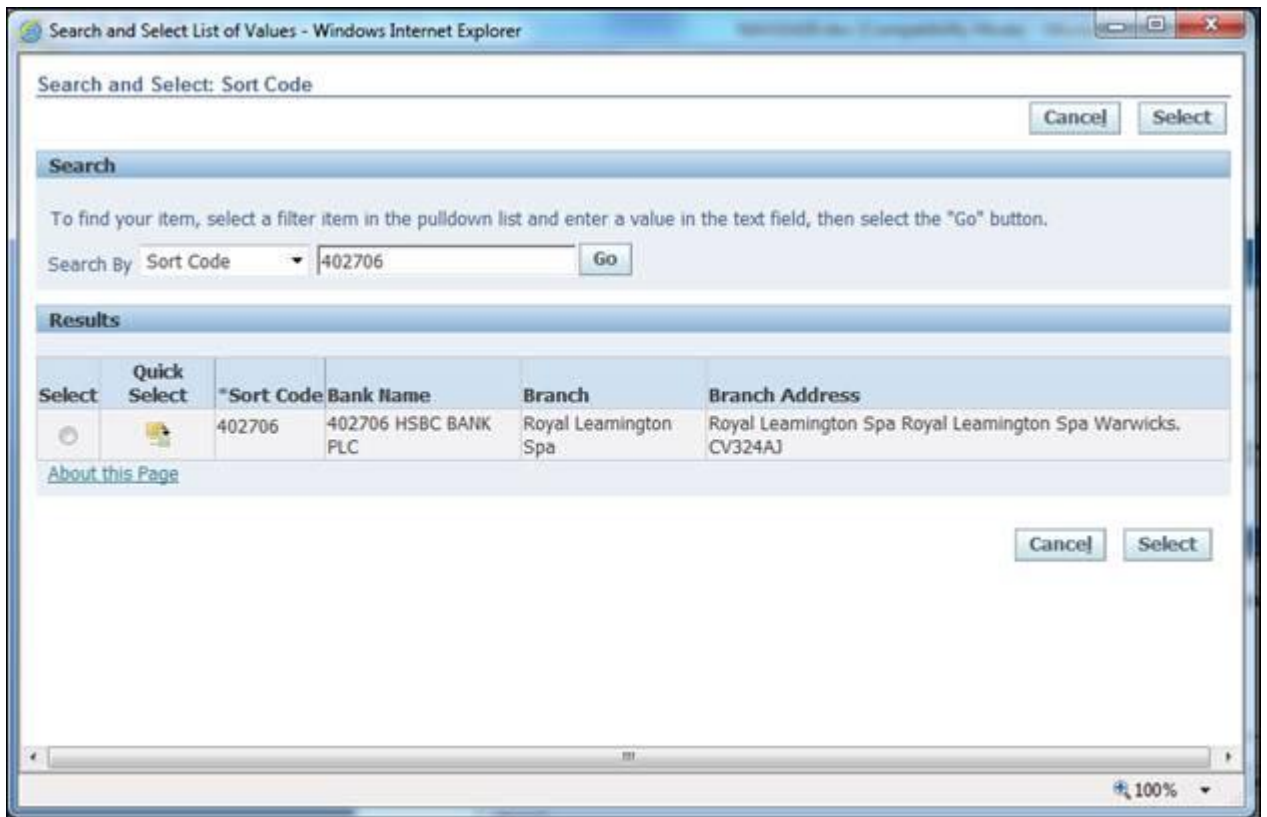
\* Account Name  Bank Name **560069 NAT WEST BANK PLC**  
\* Account Number  Branch **Wolverhampton, Queen Square**  
\* Sort Code  Bld Society Account Number

Home Logout Preferences Copyright (c) 2008, Oracle. All rights reserved.

Delete the old details from the **Account Number** field and enter the new account number.

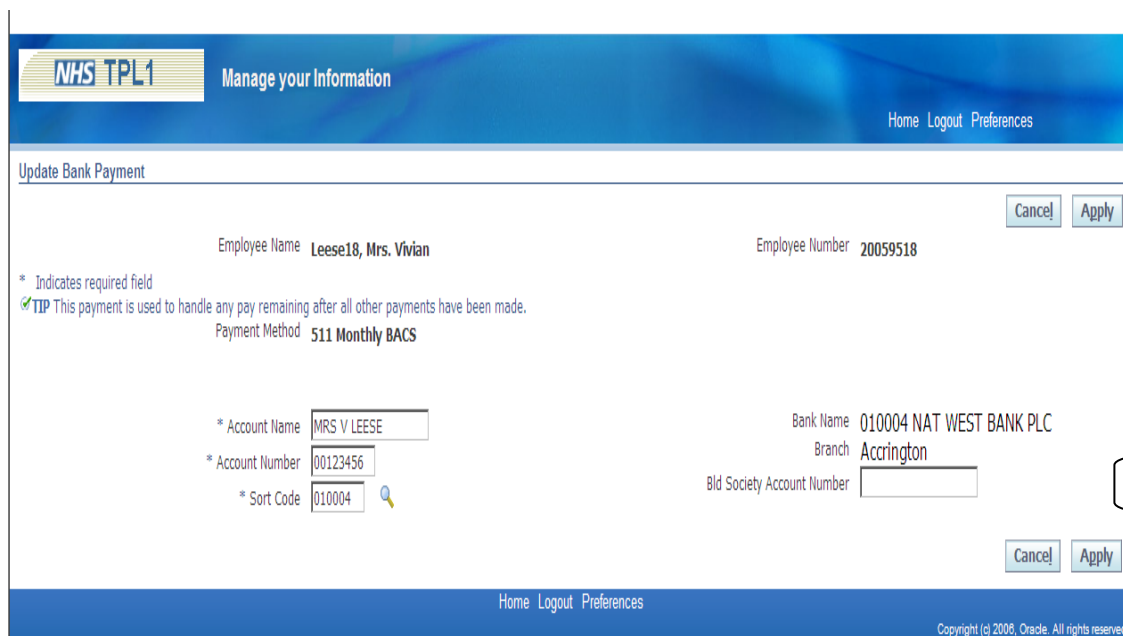
Delete the old details in the **Sort Code** field.

Click the Search icon next to the **Sort Code** field.



Enter the sort code number in the **Search By** field and click on the **Go** button.

Click the **Quick Select** icon next to the sort code.



To change your bank details overtype the existing details and click **Apply** to save the change.





Tip: Clicking on the **Magnifying Glass** icon allows you to search for your bank.

Please ensure that you have a valid bank account in ESR at all times, if you delete an account, please ensure you enter a new account. **Failure to do this WILL delay your pay.** If you no longer have a bank account, please contact Payroll on 37600.

## 4. Updating Religious Belief and Sexual Orientation

This section allows you to update your Religious Belief and Sexual Orientation.

From the **home** page click on **Employee Self Service (Limited Access) > Religious Belief and Sexual Orientation**

To update your details click **Update**

The screenshot shows the 'Religion Sexual Orientation' page in the NHS TRD1 system. The page title is 'Religion Sexual Orientation'. The employee name is 'Ayres, Mrs. Pamela' and the employee ID is '20055088'. There are two input fields: 'Religious Belief' and 'Sexual Orientation', each with a magnifying glass icon. A speech bubble labeled 'Torch' points to the magnifying glass icon next to the 'Religious Belief' field. There are 'Cancel' and 'Apply' buttons at the top right and bottom right of the form. The page footer includes 'Home Logout Preferences Help' and 'Copyright © 2005, Oracle. All rights reserved.'

Click on the **torch icon** and **select** the appropriate values

Click **Apply**

Click **Next**

Ensure the change is accurate and click **Submit**

## 5. On-line payslips

This section allows you to view your payslips.

From the **home** page single click on **Employee Self Service (Limited Access)> On-line payslips**

Choose the payslip you wish to view from the **Choose a payslip** menu and click **go**. (The latest payslip available will be shown automatically)

## 6. On-line P60s

This section allows you to view your P60s.

From the **home** page single click on **Employee Self Service (Limited Access)> On-line P60**

The screenshot shows the NHS TRD1 Employee Self Service interface. At the top, there is a blue header with the NHS TRD1 logo and the text "Manage your Information". To the right of the header are navigation links: "Navigator", "Favorites", "Home", "Logout", "Preferences", and "Help". Below the header, the user's information is displayed: "Employee Name: Steele, Mrs. Kerry", "Organization Email Address", "Employee Number: 20000748", and "Business Group Name: NHS Business Group". There is a "View Report" button to the right of the employee information. Below this, there is a section for selecting the tax year and assignment, with the text "Choose the Tax Year and Assignment for which you wish to view the eP60 and click the View Report button". A "Tax Year" label is present, followed by a radio button and the text "© 2014 Assignment Number:20000748(RTI P60 Archiver)". Another "View Report" button is located to the right of this section. At the bottom of the page, there is a blue footer with the text "Home Logout Preferences" and "Copyright (c) 2008, Oracle. All rights reserved."

An entry will be available for each tax year processed

Select the radio button for the required tax year and click the **View Report** button.

Click **Open** when prompted to view the P60.

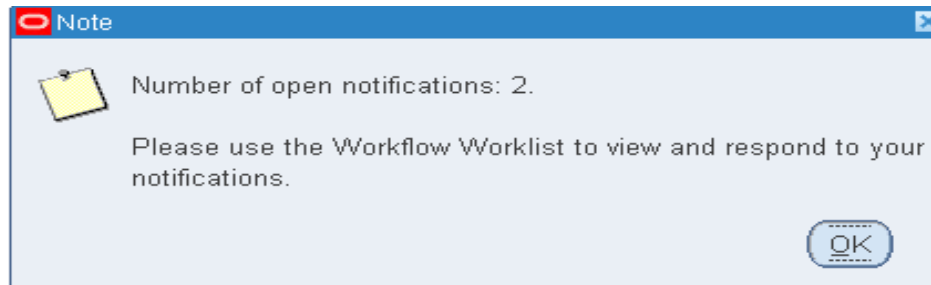
Alternatively the file can be saved locally by clicking the Save As option.

**Example Output:**

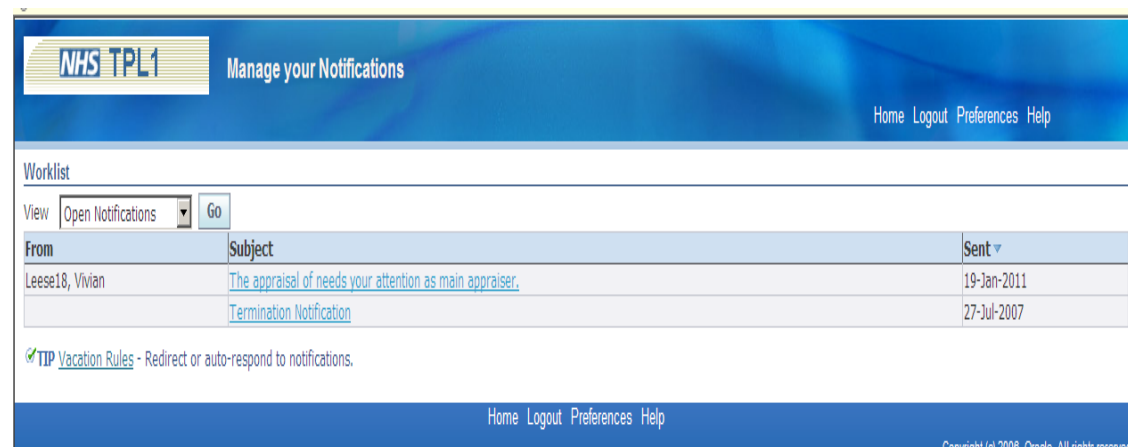
<b>P60 End of Year Certificate</b>		<b>Employee's details</b>				
<b>Tax year to 5 April 2014</b>		Surname	STEELE			
<b>This is a printed copy of an eP60</b>		Forenames or Initials	KERRY			
<p>To the employee: Please keep this certificate in a safe place as you will need it if you have to fill in a tax return. You also need it to make a claim for tax credits or to renew your claim.</p> <p>It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National insurance contributions.</p> <p>By law you are required to tell HM Revenue &amp; Customs about any income that is not fully taxed, even if you are not sent a tax return</p> <p style="text-align: right;"><i>HM Revenue &amp; Customs</i></p> <p>The figures marked ★ should be used for your tax return, if you get one</p>		National Insurance number	Works/payroll Number			
		NB986532C	20000748			
<b>Pay and Income Tax Details</b>						
	Pay		Tax deducted			
	£	p	£	p		
In previous employment(s)		0 00		0 00		
In this employment	★	5159 49	★	1031 40		
			<i>If refund mark 'R'</i>			
Total for year		5159 49		1031 40		
		Final tax code: BR M1				
<b>National Insurance contributions in this employment</b>						
NIC table letter	Earnings at the Lower Earnings Limit (LEL) (where earnings are equal to or exceed the LEL)	Earnings above the LEL, up to and including the Primary Threshold (PT)	Earnings above the PT, up to and including the Upper Accrual Point (UAP)	Earnings above the UAP, up to and including the Upper Earnings Limit (UEL)	Employee's contributions due on all earnings above the PT	
	£	£	£	£	£ p	
D	1419	519	3221	0	334 20	
<b>Statutory payments included in this pay 'In this employment' figure above</b>						
	£	p	£	p	£ p	
Statutory Maternity Pay		0 00	Ordinary Statutory Paternity Pay	0 00	Additional Statutory Paternity Pay	0 00
Statutory Adoption Pay		0 00				
<b>Other details</b>						
Student Loan deductions in this employment (whole £s only)	£ 0					
<b>To employee</b>						
STEELE KERRY MRS.		20000748				
1 High Street						
Warwick						
CV34 6NZ United Kingdom						
<b>Your employer's full name and address (including postcode)</b>						
Dummy Statutory Name						
Dummy Stat Address						
Employer PAYE reference 999 Z9999						
<b>Certificate by Employer/Paying Office:</b> This form shows your total pay for Income Tax purposes in this employment for the year. Any overtime, bonus, commission etc, Statutory Sick Pay, Statutory Maternity Pay, Ordinary Statutory Paternity Pay, Additional Statutory Paternity Pay or Statutory Adoption Pay is included.						
P60 (Substitute) (Oracle UK) (2013-2014)		Do not destroy				
© Copyright Oracle Corporation UK						

## 7. Notifications

A notification in ESR is a system delivered message which is for information purposes. When logging onto ESR you will receive a **'note'** informing you of any notifications in your inbox.



To view your workflow notifications, from the **home** page click on **notifications**. This will present you with the following screen.



From	Subject	Sent
Leese18, Vivian	<a href="#">The appraisal of needs your attention as main appraiser.</a>	19-Jan-2011
	<a href="#">Termination Notification</a>	27-Jul-2007

Click on the subject of the notification to see the message.

Once you have viewed a notification and taken any necessary action, delete it.

## 8. All Actions Saved for Later

Throughout Employee Self Service there is the option to **save for later**, this can be used if you are part way through a change but do not have chance to complete it.

To retrieve any actions you have saved for later from the **home** page select **Employee Self Service (Limited Access) > All actions saved for later**.

This will provide a list of all the pending changes.

NHS TPL1 Manage your Information Home Logout Preferences Help

All Actions Awaiting Your Attention Employee Name Leese18, Mrs. Vivian Employee Number

Subject	Sent	Name	Assignment Number	Department	Job	Effective Date	Status	Update	Delete
NHS Employee EIT	20-Jan-2011	Leese18, Mrs. Vivian	20059518	511 Trust Board	Nursing and Midwifery Registered Director of Nursing	20-Jan-2011	Work in Progress		
NHS Employee Personal Information - Basic Details	20-Jan-2011	Leese18, Mrs. Vivian	20059518	511 Trust Board	Nursing and Midwifery Registered Director of Nursing	20-Jan-2011	Work in Progress		

Home Logout Preferences Help Copyright (c) 2008, Oracle. All rights reserved.

To resume the change click **update**, or to delete the change click **delete**

## 9. View Only Information

Within Employee Self Service you are able to 'view only' some information as follows...

**Employment Information** Allows you to view the details of your role with the Trust and other related information.

**Absence Calendar** Allows you to view your Sickness Absences with the Trust.

**Competence Profile** Allows you to view your Mandatory Training Dates.

**Compliance Matrix** Allows you to view your compliance against the required Mandatory Training for your role.

**Qualifications** Shows the details for any qualifications the Trust has recorded for you

**Registrations & Memberships** Shows details of your Professional Registration

**Total Reward Statement** This is not currently being used but will be available late 2014.

After looking at the above information in ESR, if you have an queries please email [plh-tr.WorkforceDevelopment@nhs.net](mailto:plh-tr.WorkforceDevelopment@nhs.net)

## 10. Completing e-Learning

From the **Home** page click **216 e-Learning User > e-Learning**

**NHS EPRD Learning Management**

Home Logout Preferences Help

Home Catalog Learning History

Search Course  Exact Phrase  [Advanced Search](#)

**Learning Paths**

Unsubscribing from a learning path does not unenroll you from any classes.

Learning Path Name	Learning Path Status	Source	Mandatory Courses Completed	Start Date	Due Date	Completion Date	Move to History
No results found.							

**Enrollments**

Enrollments includes all current enrollments, including those in classes that are part of a learning certification or learning path. However, you can play online classes that are part of an active learning certification (and view performance status) only from the Learning Certification details page.

Course Name	Offering Name	Enrollment Date	Status	Completion Date	Play
<a href="#">216 ECG Study Day</a>	<a href="#">216 ECG Study Day e Learning</a>	08-SEP-2011 11:59	<a href="#">Incomplete</a>		<input type="button" value="Play"/>
<a href="#">216 Trust Update Clinical</a>	<a href="#">216 Trust Update Clinical e Learning</a>	06-JUN-2011 15:30	<a href="#">Incomplete</a>		<input type="button" value="Play"/>
<a href="#">216 Trust Update Medical</a>	<a href="#">216 Trust Update Medical e Learning</a>	14-SEP-2011 10:42	<a href="#">Completed</a>	15-SEP-2011 12:28:21	<input type="button" value="Play"/>
<a href="#">216 Manual Handling Theory</a>	<a href="#">216 Manual Handling Theory e Learning Clinical</a>	27-SEP-2011 10:29	<a href="#">Not Attempted</a>		<input type="button" value="Play"/>
<a href="#">216 Searching Healthcare Databases Advanced Search - e-learning</a>	<a href="#">216 Searching Healthcare Databases Advanced Search -e-learning</a>	31-AUG-2011 12:26	<a href="#">Completed</a>	01-SEP-2011 10:32:37	<input type="button" value="Play"/>

**Announcements**

- You have 0 new notifications.

**Browse Catalog**

- [Customer Relations](#)
- [Health & Safety](#)
- [Induction](#)
- [Informatics](#)
- [Medical Equipment](#)
- [Occupational Knowledge & Skill...](#)
- [Personal Development](#)
- [Post-Graduate Health Care and ...](#)
- [Resuscitation](#)
- [Risk Management](#)
- [More...](#)

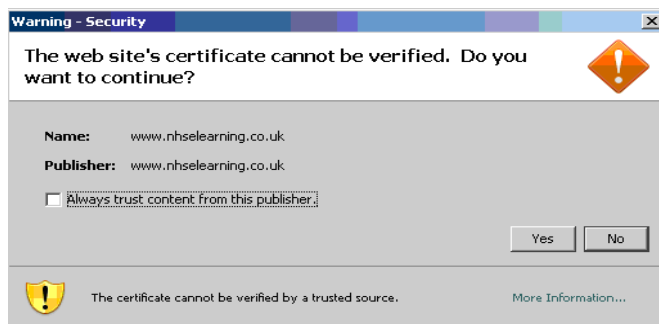
Privacy Statement Home Catalog Learning History Home Logout Preferences Help Copyright (c) 2008, Oracle. All rights reserved.

Click on the **Play Button** for the appropriate course

If the below 'Warning-Security' message appears, select **Run**



If the below 'Warning-Security' message appears, select **Yes**



Click on the **links** in the left hand margin to go to the different parts of the course. The icons alongside each link will be highlighted with a blue circle when you finish each section.

Ensure you allow the tab to progress along the scroll bar on the presentation to complete the module fully. You will know this is complete when the tab is fully on the bottom right hand side of the screen and you can access the next module with no error message.

Once you have completed the course, or if you need to leave the course and return at a later date, click the **Home** button which shows 'Click the Home icon to exit the course correctly'

**Never just close the browser window as you may lose your place in the module and your assessment results will not be recorded**



Tip: Use the 'Next 10' button to view additional courses you may have been booked on.

Once you have completed a course **click** on the **Move to History Tab**.

**Learning History Tab**

**Competency Requirements**

**Move to History**

Course Name	Status	Item In	Completion Date	Play	Start Date	Start Time	End Date	End Time	Move to History	Unenroll	Evaluate	Add to Outlook
000 LDF - 04 The Edward Jenner Programme: Improving Services	Incomplete				06-Jun-2013	00:00						
000 LDF - 03 The Edward Jenner Programme: Setting Direction	Not Attempted				06-Jun-2013	00:00						
000 LDF - 01 The Edward Jenner Programme: Managing Services	Not Attempted				06-Jun-2013	00:00						
210 Catheterisation Study Day	Incomplete				01-Jan-2014	00:00	31-Dec-2014	23:59				
000 LDF - 00 The Edward Jenner Programme: Leadership Foundations	Completed		17-Dec-2013		06-Jun-2013	00:00						
000 LDF - 01 The Edward Jenner Programme: Demonstrating Personal Qualities	Not Attempted				06-Jun-2013	00:00						
210 Radiology & Cardiology	Incomplete				26-Jul-2012	00:00						
000 LDF - 02 The Edward Jenner Programme: Working with Others	Not Attempted				06-Jun-2013	00:00						
210 Bonebank	Incomplete				19-Nov-2013	00:00						

To view details of your Learning History, click on the **Learning History Tab**.

You can check your competency requirements on the left hand of the side shown above. If you are up to date, you will see no competency showing and all will show green. Amber is within 90 days of expiring and will appear in this section with an expiry date and Red is out of date and will show in the same section.

To view all details for your competency requirements, click on the **Compliance Matrix** button.

## 10.1 Accessing e-Learning from Home

From the **Home** page click **e-Learning User > Request Internet Access**

Enter a new username and password for your remote access. This will allow you to complete e-learning externally from outside of the Trust.

Use the following link to access e-Learning remotely

[https://www.nhselearning.co.uk/OA\\_HTML/xxnhs/xxnhsInternetLogin.jsp](https://www.nhselearning.co.uk/OA_HTML/xxnhs/xxnhsInternetLogin.jsp)

**Please use the PC Checker & Matrix links enclosed below to ensure that your home computer is compatible with the e learning required in order to ensure it records your progress accurately**

<http://www.esrsupport.co.uk/nlms/pccheck.html>

<http://www.esrsupport.co.uk/nlms/matrix.html>

## 11. Further Assistance

If you require further assistance or need any information, please contact:

**Workforce Development Team**

(4)32112

[plh-tr.workforcedevelopment@nhs.net](mailto:plh-tr.workforcedevelopment@nhs.net)

Please ensure you are using the computer and have the asset number available when calling