ESR (Electronic Staff Records) Portal User Guide V1.9 (January 2024)

Scan the relevant QR code with your mobile device to download the **My ESR** app.

Please note

When undertaking e-learning, priority should be given to Core and Advanced mandatory training topics (*can be checked via https://www.bedsft-training.co.uk/training - Mandatory Training Information Leaflet).* These subjects are included in the Pay Progression monitoring process. The requirements for your post will be flagged up to you via the ESR Portal Homepage as part of the 'My Compliance' section.

Contents

NOTE: this user guide has been designed to be used electronically. Whilst it can be printed, we recommend that you download and use the latest copy from our website - click here.

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Accessing the ESR Portal

Access for all ESR users – employees, managers and professional/core users is now through the ESR Portal. (https://my.esr.nhs.uk)

We highly recommend that e-learning is completed via Microsoft Edge.

Non-Smartcard Users

All new starters will receive a username and password as part of Corporate Induction. If you are an existing member of staff and do not know your credentials, please click here to request a reminder in the first instance. Details will be sent to your Trust e-mail address.

If for some reason you are unable to use the above functionality, please click here to see to the Contacts section in order to identify your ESR System Administrator.

Smartcard Users

If you work in one of the following departments: Human Resources, Finance, Learning and Development, Recruitment, Occupational Health or Clinical Devices or are otherwise instructed to, please browse to https://my.esr.nhs.uk and click on the **Log in with my Care Identity** button. *You must use Microsoft Edge as a smartcard user.*


Click here to return to the Contents page.

What is the ESR Portal?

The ESR Portal provides access to a number of dashboards; users will see different options depending on the permissions held.

The My ESR dashboard is the default view for all users when accessing the portal. It contains a number of key features such as links to Notifications, Settings and Portlets.

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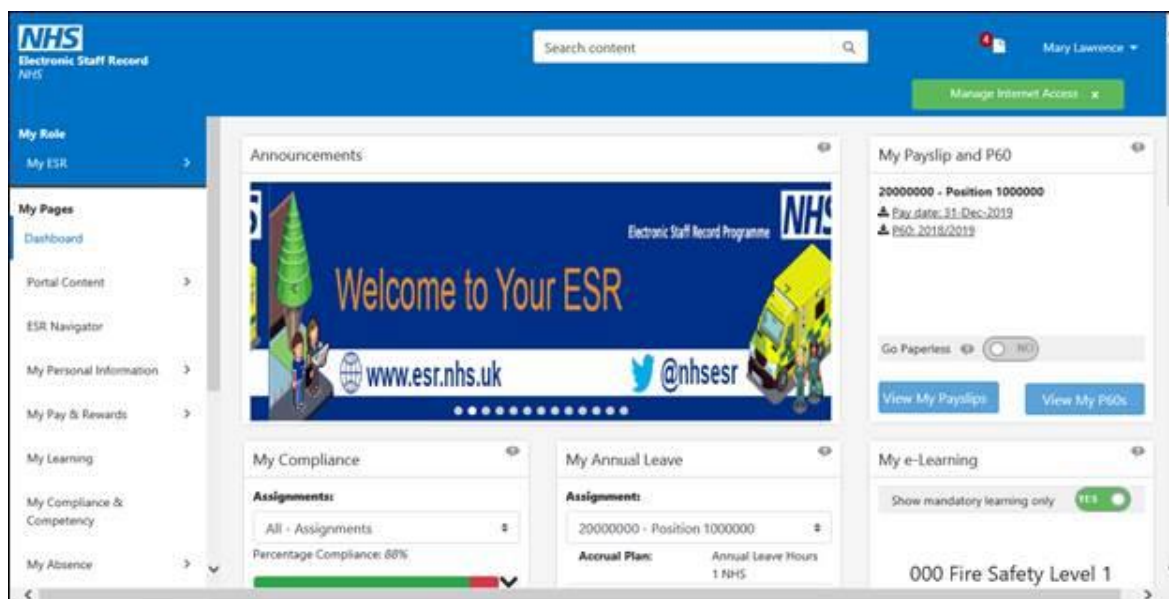
The above screenshot is for demonstrational purposes only and may differ to what you see when logged onto your account.

ESR Announcements

The Announcements portlet can contain both local and national messages.


The latest 20 messages will rotate automatically.
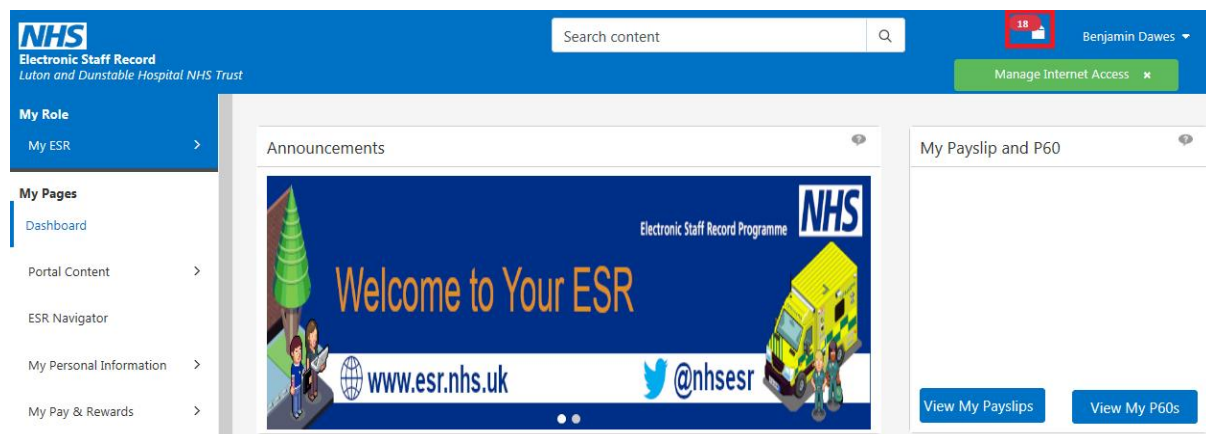
Click here to return to the Contents page.

ESR Notifications

If your e-mail address is recorded in ESR, you will receive e-mail notifications directly to your e-mail inbox.

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If you are using an NHS Mail e-mail address (name@nhs.net) or an e-mail domain which is an approved secure domain, e-mail notifications will display with full content. If you are not using an e-mail address which is part of a registered secure domain, the notification will display similarly to the below screenshot.
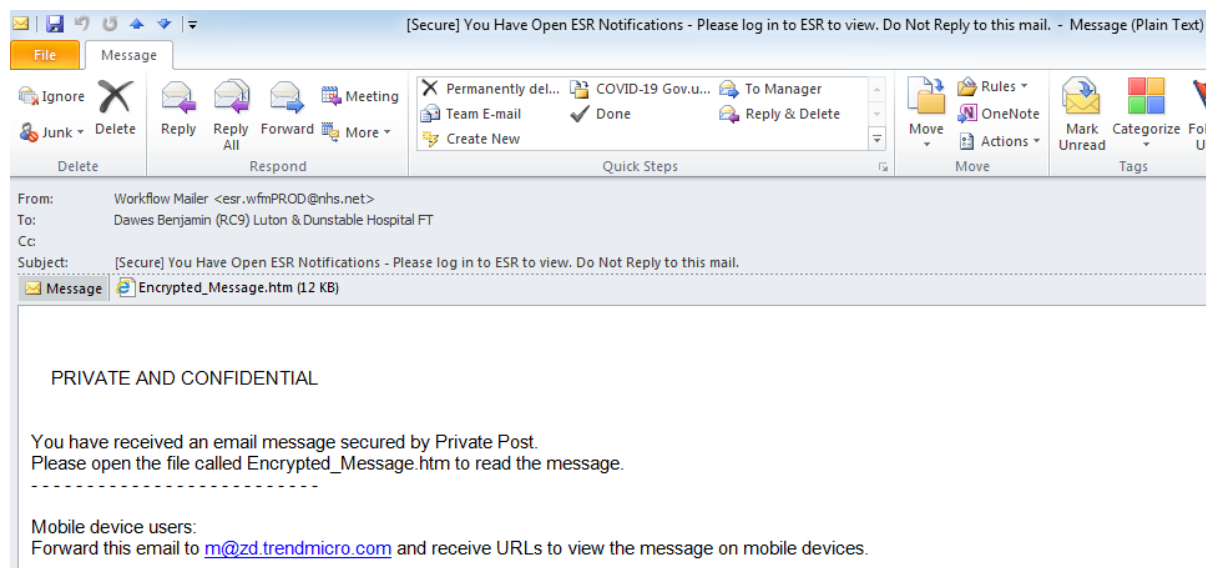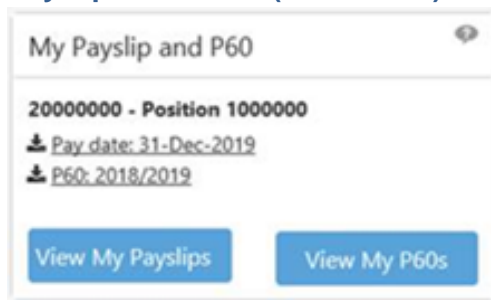

It is possible to check your notifications via the ESR Portal – 'My ESR' Dashboard which is the first page you see once logged in. Click on the notifications symbol to get started.

You will see a list of any open notifications you have received. Click on the subject title to view and action the notification as appropriate. Click here to return to the Contents page.

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Payslips and P60s (ESR Portal)

My Payslip and P60

20000000 - Position 1000000
⬇ Pay date: 31-Dec-2019
⬇ P60: 2018/2019

View My Payslips   View My P60s

This portlet enables you to view your payslips and P60s. The assignments and related payslips and P60s available are first ordered based on the most recent pay date and tax year respectively, then by Assignment number (in ascending order).

Newly generated payslips/P60s, since you last logged on to the Portal, will be highlighted with a 'New' icon. Once you have accessed the new payslip/P60, the 'New' icon will disappear.
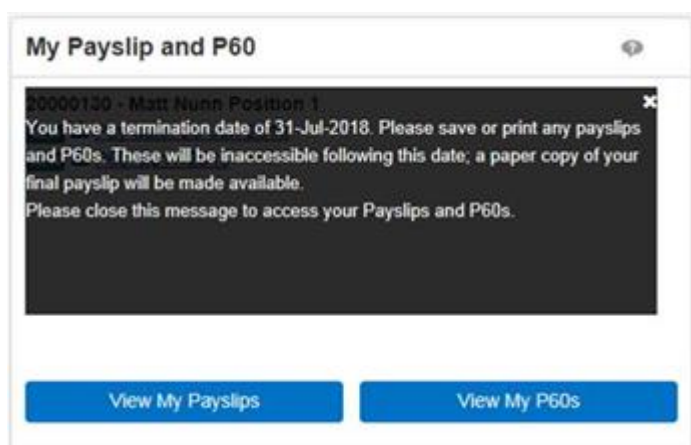
Payslips/P60s will be displayed for up to 4 assignments (according to the most recent pay date/tax year respectively). You can download payslips/P60s from this portlet which, once downloaded, will be available in a PDF format. In some cases, before you can open your payslip/P60, the PDF file will be downloaded to your device.

Please ensure that you save your payslip/P60 in a secure area and remove the downloaded file if you are using a public or shared computer.

You can click on the View My Payslips button which will take you directly to the ESR Online Payslip page where your full payslip history is available.

Clicking the View My P60s button will take you directly to the ESR Online P60 page where your full P60 history is available.

When a termination date has been entered for an Employee a message will be displayed in the My Payslip and P60 Portlet as follows:

My Payslip and P60

20000130 - Matt Nunn Position 1.
You have a termination date of 31-Jul-2018. Please save or print any payslips and P60s. These will be inaccessible following this date; a paper copy of your final payslip will be made available.
Please close this message to access your Payslips and P60s.

View My Payslips   View My P60s

Click here to return to the Contents page.

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My Compliance Portlet (ESR Portal)

This portlet provides a compliance summary across all of your assignments by default. If you have more than one assignment, the assignments available in the dropdown menu are listed in order of the least compliant assignment to the most compliant assignment. Selecting an assignment from the dropdown list will automatically update the compliance indicators.

If you are not fully compliant the percentage compliance indicator bar will show the green aspect of the bar progressively increasing towards 100% compliance, reducing the red portion.

Clicking the arrow next to the compliance indicator bar will display competencies that have expired, are nearing expiry or that have not been attained as follows:
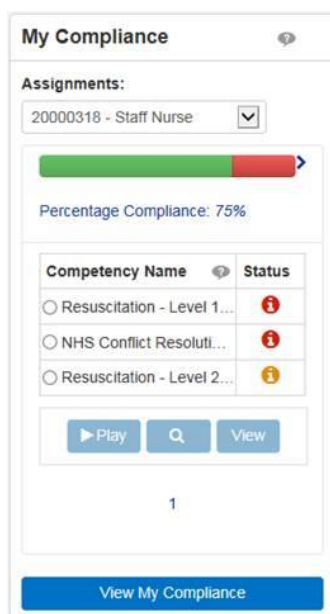
In the Status column the information icon will provide further details for each competence as follows:

- Red – competence is yet to be attained
- Red – competence has expired
- Amber – competence has 3 months or less to expiry

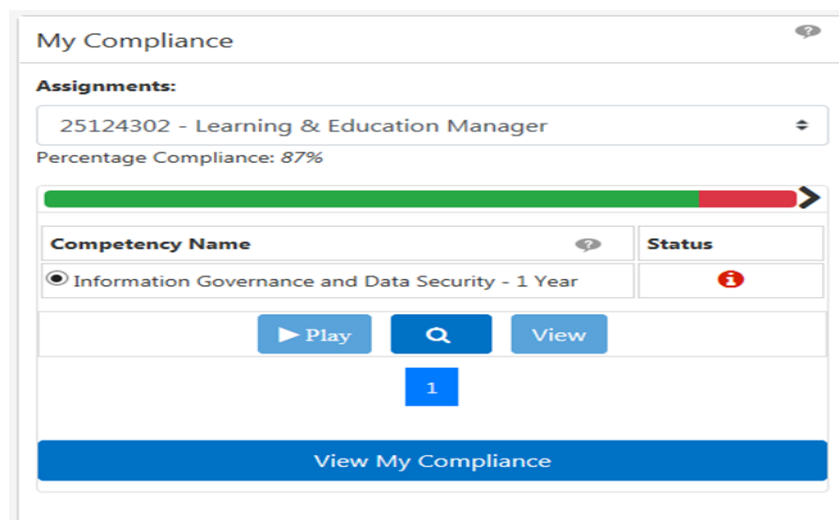With the view expanded, selecting the radio button against a competence will allow you to:

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▶ Play — play e-Learning that will meet your competency requirement

Q — search for suitable learning that will meet your competency requirement

View — view information about an existing enrolment or subscription

If your play button does not automatically appear this is because you have not enrolled into the E Learning package before. Please see below on how to enrol. For this example I will use Information Governance. Please follow the below steps. Only proceed if you have not enrolled onto the course.

Step 1: Select the required training and please click on the magnifying glass.

My Compliance

Assignments:

25124302 - Learning & Education Manager

Percentage Compliance: 87%

Competency Name	Status
⦿ Information Governance and Data Security - 1 Year	❶

▶ Play   Q   View

1

View My Compliance

Step 2: Click the button on the right hand side in the Details column under Certifications.

Certifications
Certifications that will give you the competence. Click Details to Subscribe to Certificate.

Certification Name △	Valid Period △	Certification Status △	Progress ▲	Competence Level △	Details	Renew
E-Learning - Information Governance and Data Security Awareness Level 1	365 Day(s)			1 - Assessed	🔲	

Step 3: Click on subscribe in the top right hand corner of your screen.

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Subscribe   Unsubscribe

You must complete this certification in   365   Day(s)
Completed certification is valid for   365   Day(s)
Renewable   Yes

Components

Course Name	Course Sequence ▲
000 Data Security Awareness Level 1	1

Competencies

Competency	Proficiency Level
NHS|CSTF|Information Governance and Data Security - 1 Year| ⓘ	1 - Assessed

Step 4: Click finish on the top right hand corner of your screen.

Governance

Back   Finish

You must complete this certification in   365   Day(s)
Completed certification is valid for   365   Day(s)
Renewable   Yes

Step 5: You can now click on the play button. *Due to the size of the next image, this section continues on the following page.*

To complete this certification, you must complete all the components within the certification. To complete a course, find an offering in the courses table below, and enroll in one of its classes.

◢ Certification Summary

Subscription Number 17381721
You began this certification period on 28-Feb-2020
You must complete this certification by 27-Feb-2021
Your current certification expires on 27-Feb-2022

You can next renew your certification on 27-Feb-2021
Renewable Yes

Components

Course	Component Completion Date	Component Status	Enrolment Details	Choose or Enrol in class	Performance Status	Play
000 Data Security Awareness Level 1		Active	▤	🗞	Incomplete	▭

Competencies

Competency	Proficiency Level
NHS|CSTF|Information Governance and Data Security - 1 Year| ⓘ	1 - Assessed

Please remember to click on the blue home button on the top right hand corner of the screen once you have completed your E Learning package.

Now you have enrolled onto your E Learning package you will not have to enrol again. When the topic is up for renewal it will automatically allow you to play it from the first screen on your My Compliance Portal.

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If you are 100% compliant but have one or more competencies with 3 months or less to expire the following information will be displayed:

When the portlet is expanded the competencies can be actioned as follows:

Clicking the **View My Compliance** button on the main portlet will launch the Compliance and Competency page where you can view more detail.

Click here to return to the Contents page

My Learning (Learner Homepage)

The Learning Homepage can be used for a variety of tasks including, but not limited to; Accessing e-learning, viewing your learning history (including external completions), training bookings, checking class booking details and/or cancelling a booked session. You can also see a list of any Learning Certifications you are subscribed to.

To access the Learner Homepage, click on either **My Learning** or **Learner Homepage**.
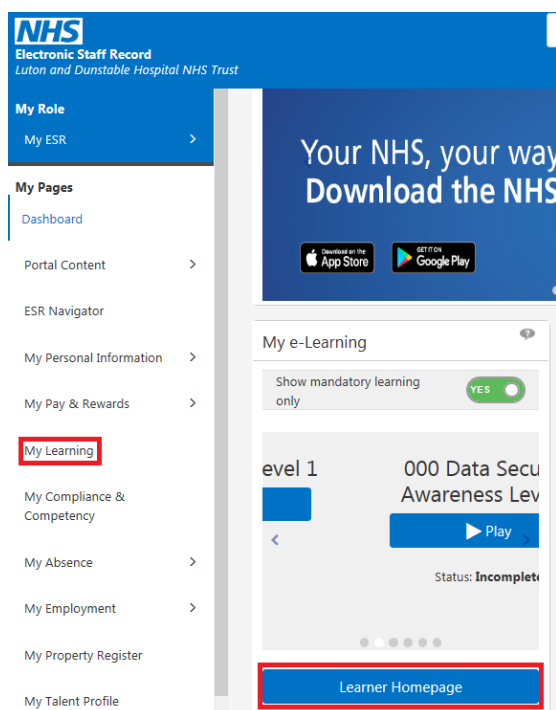

External Training Completions

We recommend that where possible, all e-learning is completed on the ESR Portal. Not only does it record directly onto your learner record, but it also highlights the training requirements applicable to the position you hold within the organisation. This avoids a situation whereby the incorrect e-learning is completed unnecessarily.

Please ensure all training attended externally, or any e-learning completed elsewhere is reported to the relevant e-learning support team. Please see the contact section for more information.

To view your learning history and/or external training completions, please refer to the **Learning History** section (Page 12).
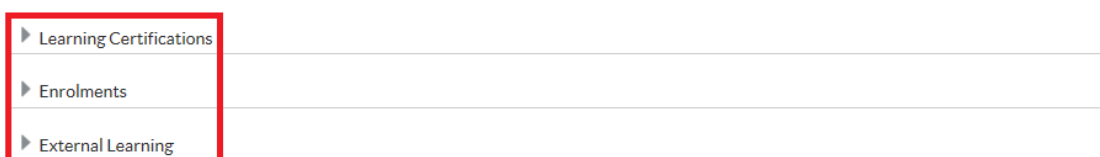
Click here to return to the Contents page.
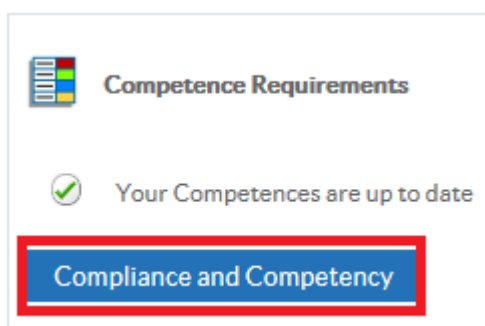
Learning History (Learner Homepage)
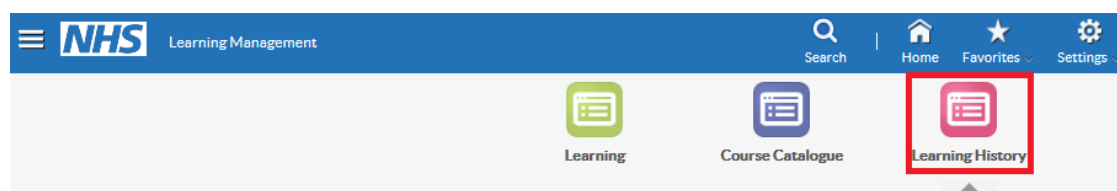
The **Learning History** page is split into three sections; Learning Certifications, Enrolments and External Learning.

- Learning Certifications - provides details of certifications you are subscribed to, with details of the subscription status and renewal dates
- Enrolments - provides details of all training you have been enrolled onto throughout your time within the organisation. This includes e-learning and classroom based training
- External Learning – this section provides details of any training completed in other employment, or as part of your previous employment. It also includes any training you have completed externally and have reported to the relevant e-learning support team.

Compliance and Competency (Learner Homepage)

The Compliance and Competency page is useful to check the full list of your training requirements, the expiry date for each topic and allows you to print off a summary which can be used as part of your appraisal review meeting to evidence your compliance.

This section continues on the next page.

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Learning: Compliance and Competency

Back

Employee Name
Employee Number

Learner Home Page

| Compliance | All Competencies | Awaiting Approval |

TIP To view compliance for any additional assignments, select assignment from drop down and press Go

Technical and Information ▼   Go   Compliance Percentage   100.0%

☑ Required Competencies Only

TIP To view required competencies only, tick the checkbox and press Go

Export   Printable Page | ⟳

Details	Competency Name △	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning
>	418|LOCAL|Resuscitation - Level 1 (Non-Clinical - e-learning)|	1 - Competent		Y	No Expiry		🔍
>	NHS|CSTF|Equality, Diversity and Human Rights - 3 Years|	1 - Assessed		Y	29-Jul-2020		🔍
>	NHS|CSTF|Fire Safety - 2 Years|	1 - Assessed		Y	15-Mar-2022		🔍
>	NHS|CSTF|Health, Safety and Welfare - 3 Years|	1 - Assessed		Y	29-Jul-2020		🔍
>	NHS|CSTF|Infection Prevention and Control - Level 1 - 3 Years|	1 - Assessed		Y	29-Jul-2020		🔍
>	NHS|CSTF|Information Governance and Data Security - 1 Year|	1 - Assessed		Y	07-Jan-2021		🔍
>	NHS|CSTF|Moving and Handling - Level 1 - 3 Years|	1 - Assessed		Y	29-Jul-2020		🔍
>	NHS|CSTF|NHS Conflict Resolution (England) - 3 Years|	1 - Assessed		Y	16-Dec-2022		🔍
>	NHS|CSTF|Safeguarding Adults - Level 1 - 3 Years|	1 - Assessed		Y	15-May-2022		🔍
>	NHS|CSTF|Safeguarding Children - Level 1 - 3 Years|	1 - Assessed		Y	13-Jun-2022		🔍

> Show Key

To filter this page to show only the required competencies for your role, click on **Required Competencies Only**.

If you would like to print a copy of this page, click on **Printable Page.** A new window will open; push CTRL + P to print the page. *This applies to PC users only.*

In terms of accessing your mandatory training, please click here to refer to the **My Compliance** section (Page 7).

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Classroom Enrolments (Learner Homepage)

Click on the **Enrolments** tab to see details of any future dated bookings. This includes the start date and times, venue details and even allows you to cancel the booking yourself using the unenrol symbol.

If you are an Outlook user and would like a reminder in your calendar, click on the symbol.

Ad-hoc Bookings (Learner Homepage)

It is possible to book your own training via the Learner Homepage. In the search bar at the top of the screen, type in a key word for the course you wish to access and then click **Go**.

The search will return all available courses. Click on the symbol to subscribe to the course.

Select the appropriate offering from the next page to continue.

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Course: 418 Excel Foundation (Version - 2010)

Use this page to view the course details. To find a class in which to enrol, click an offering name.

> Show Key Notation

Offerings

Offering Name ▲

418 (2020) Excel Foundation (Version 2010)

You will now see a list of the available training dates. Click on the [✉] symbol to enrol.

Class Name ▲	Info	Venue	Location ▲	Training Center	Start Date ▲	Start Time	Time Zone	Duration	Class Status	Enrolment Status ▲	Enrol
418 Excel Foundation (2010) - 30-JUL-2020		418|Chiltern Training Room (A)|Rear of main hospital restaurant, behind the cyber cafe area	418 C9 L&D Hospital		30-Jul-2020	09:30	GMT	3.5 Hour (s)	Normal	Not Enrolled	
418 Excel Foundation (2010) - 18-AUG-2020		418|Chiltern Training Room (A)|Rear of main hospital restaurant, behind the cyber cafe area	418 C9 L&D Hospital		18-Aug-2020	09:30	GMT	3.5 Hour (s)	Normal	Not Enrolled	
418 Excel Foundation (2010) - 22-SEP-2020		418|Chiltern Training Room (A)|Rear of main hospital restaurant, behind the cyber cafe area	418 C9 L&D Hospital		22-Sep-2020	09:30	GMT	3.5 Hour (s)	Normal	Not Enrolled	
418 Excel Foundation (2010) - 28-OCT-2020		418|Chiltern Training Room (A)|Rear of main hospital restaurant, behind the cyber cafe area	418 C9 L&D Hospital		28-Oct-2020	09:30	GMT	3.5 Hour (s)	Normal	Not Enrolled	
418 Excel Foundation (2010) - 25-NOV-2020		418|Chiltern Training Room (A)|Rear of main hospital restaurant, behind the cyber cafe area	418 C9 L&D Hospital		25-Nov-2020	09:30	GMT	3.5 Hour (s)	Normal	Not Enrolled	

Enter any special instructions if applicable, then click **Apply** to finalise the process.

Enrol: 418 Excel Foundation (2010) - 18-JUN-2020   Cancel   Apply

> Show Key Notation

Class Summary

Delivery Mode   Classroom
Course Name   418 Excel Foundation (Version - 2010)
Class Name   418 Excel Foundation (2010) - 18-JUN-2020
Start Date   18-Jun-2020 09:30
End Date   18-Jun-2020 13:00
Time Zone   GMT
Training Center
Location   418 C9 L&D Hospital
Language   English

Enrolment Details

Special Instructions [   ]

Confirmation will be displayed on screen, and if an e-mail address is registered to your account, you will receive confirmation by e-mail as well.

NOTE: We recommend that any mandatory training is booked using the My Compliance portlet.

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My Personal Information (ESR Portal)

This portlet is collapsible. If it is collapsed only your picture (where available), and your name is displayed.

If expanded your Address, Home Number, Mobile Number and Position Title will be displayed (where available).
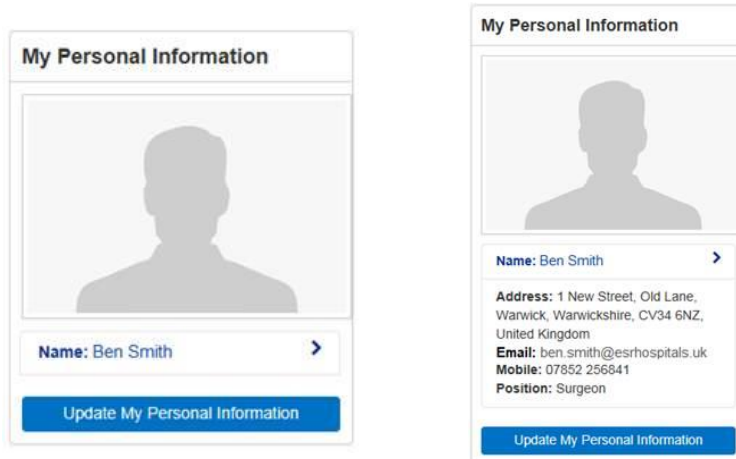
Clicking the Update My Personal Information button will take you to the Personal Information page in ESR where all information and updates can be made.

Please note if changing your home address do not overwrite any details, always use the Find Address tab to search for your address using your postcode – this ensures that your address is input in the correct fields and does not contain any typing errors. If you cannot find your address using the postcode finder please manually enter details and ensure that you follow the rules below:

Rules for input of Addresses:

- Addresses should always be entered in sentence case using a capital letter at beginning of each word i.e. Lewsey Road and not lewsey road.
- Do not enter your house number in a field on its own it must be on the same line as the street/building name.
- Town, County and Postcodes must only be entered in the correctly marked fields.
- Please ensure the above is adhered to as incorrectly entered addresses cause payroll to error when running and therefore could have an effect on your pay.

Click on the contacts tab to update and amend your next of kin etc. To amend your next of kin, you can either change an existing entry, add a new entry or remove an existing entry never overwrite an existing person with a new person.

To update your personal characteristics such as sexual orientation, ethnicity etc - type a % in the search field and click on the magnifying glass icon and you should see a drop down list to select from.

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If your email address is not shown or is incorrect please contact the relevant address:

Luton: WorkforceLuton@bedsft.nhs.uk

Bedford: WorkforceBedford@bedsft.nhs.uk

To make changes to your bank account details please click this link and follow the instructions. Please note you must be on the Trust network to update your bank details. This is for fraud prevention purposes: my.esr.nhs.uk/dashboard/lrst/ESS15/index.html

My Total Reward Statement (ESR Portal)

If you click on the **View My TRS** button will open a new window showing your Total Reward Statement.

A Total Reward Statement is personal and unique to you. It is intended to show you the value of your employment package and highlight some of the benefits which are important to you - some of which have a monetary value and others that do not. The information shown may include basic pay, incentives and local employee benefits (such as health & wellbeing and learning & development). For members of the NHS Pension Scheme it may also provide you with an overview of the value of your NHS Pension benefits.

The statement will also include important information to help you with any queries and provide you with additional details that you may need to be aware of.
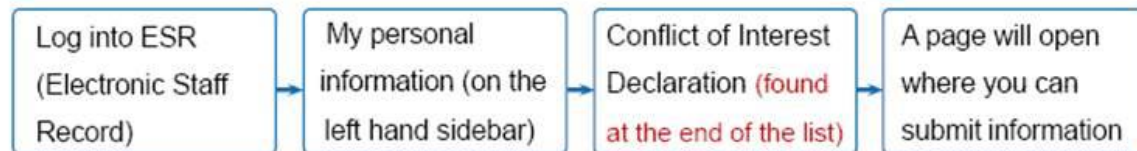
TRS has been developed and delivered in conjunction with NHS Business Services Authority, the Electronic Staff Record Programme (ESR), the Trade Unions, NHS organisations and NHS Employers.

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Mandatory Declaration of Interests

How to declare:
You will need to follow these steps by visiting ESR http://my.esr.nhs.uk

If you need a reminder of how to access the website, or your username and/or password, please click here.

What is Declaration of Interest:
During 2017, the Conflict of Interest and Declaration of Interest Policy (Including Gifts, Hospitality, Sponsorship and Fit and Proper Persons) was updated in line with national guidance. The Trust policy and NHS England guidance (Managing Conflicts of Interest) is available on the intranet L&D: https://ldhintranet.bedsft.nhs.uk/corporate-information/declaration-of-interest/ and Bedford: https://bhintranet.bedsft.nhs.uk/corporate-information/declaration-of-interest/

As part of this update, certain grades and groups of staff are required to submit a declaration of interest **annually**.

A **mandatory Declaration of Interest (even if it is a nil return)** is required annually from the following groups of staff (section 7 and 8 of the policy):

- Band 7 and above
- Medical Consultants
- Other Directors
- Executive Directors
- Non-Executive Directors

However, if you do not fit into any of the above criteria but have an interest to declare, you are still required to submit this.

What should I declare:
The policy and guidance informs you of what should be declared and the general rule is that **if in doubt declare it**.

Please include:
- Gifts
- Hospitality
- Outside employment

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- Shareholdings and other ownership interests
- Patents
- Loyalty interests
- Donations
- Sponsored events
- Sponsored research
- Sponsored posts
- Clinical private practice

Here are some examples:

☐ *"I have received gifts and/or sponsorship of over £50.."*
☐ *"I carry out private work or NHS work in private sector.."*
☐ *"I have been invited to participate in an advisory board meeting by a pharmaceutical company.."*
☐ *"I have shares in a pharmaceutical company.."*
☐ *"My spouse/partner works for a printing company which is a supplier of the Trust.."*
☐ *"I am a board member of a company.."*
☐ *"I have none of the above – Confirm on ESR that you have 'None to Declare'.."*

Nothing to Declare?

You are still required to confirm on ESR that you have **'None to Declare'**.

Need Help?

Please email DeclarationofInterest@ldh.nhs.uk (L&D Hospital) or Declarationsofinterest@bedfordhospital.nhs.uk (Bedford hospital) if you need any clarification regarding DOI or if you would like the Corporate Governance Team to give you a call.

C17 Managing
Conflicts of Interest P

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Intranet

We (The Training and Learning Team) do not use the Trust Intranet for storing our information. Please see https://www.bedsft-training.co.uk/ for course details and other useful information.

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E-Learning Troubleshooting

Please ensure you are using Microsoft Edge. Microsoft Edge is available on Windows 10 and 11, push the Windows key and search for 'Edge'.

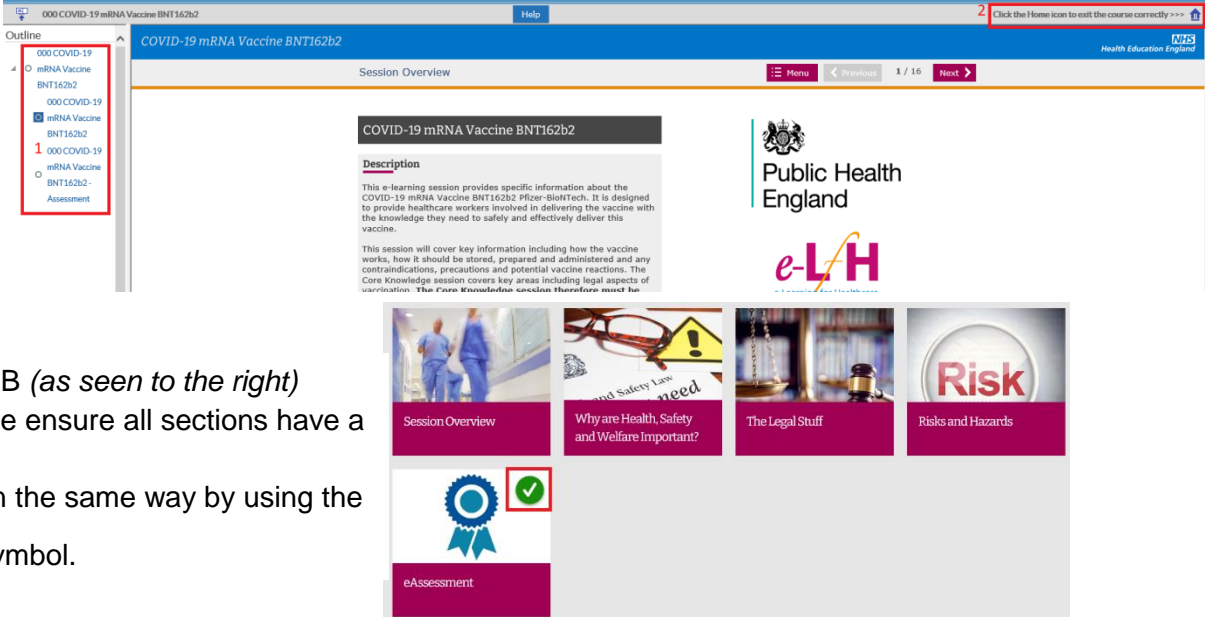How to check your web browser is up-to-date: https://www.whatismybrowser.com/

Please ensure pop-ups are allowed for the ESR website and when you load into an e-learning module. There are multiple content hosts which link in to ESR, so if prompted, you will need to enable pop-ups for the website in use.

Use of a out of date web browser or pop-ups being blocked are the most common reasons why progress is not recorded. However, there are other possible causes such as the below:

Sections remain incomplete

Please ensure all sections in the course outline **(1)** are completed, and that you save your progress by clicking on the 🏠 symbol **(2)** after viewing all pages and completing any assessments throughout. This is imperative for it to record as completed.

A)

Type B *(as seen to the right)*
Please ensure all sections have a tick.
Exit in the same way by using the 🏠 symbol.

If after following the above steps your training has still not updated, please contact our team. Please provide screenshots of your course overview page on ESR and the results page from https://www.whatismybrowser.com/. This is necessary to raise a fault call with our supplier for further investigation.
If you require immediate support, please do not hesitate to contact a member of our team.

Contact Details

Mailbox / Type of Query	
Appraisal and Pay Progression	Appraisals@ldh.nhs.uk – Luton
HRAppraisals@bedfordhospital.nhs.uk - Bedford

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Training bookings and general enquiries	TrainingBookings@ldh.nhs.uk – Luton EducationCentreBookings@bedfordhospital.nhs.uk - Bedford
ESR E-Learning Support *(not to be used for Healthroster questions)*	e-learning@ldh.nhs.uk – Luton E-Learning@bedfordhospital.nhs.uk - Bedford
Apprenticeships Team – Bedford Site	
Apprenticeships@bedfordhospital.nhs.uk	apprenticeships@bedsft.nhs.uk

Name	Job Title	Sub Team	Email	Tel
Samantha Brett	Head of Training and Learning	Head of Department (Cross-Site)	Samantha.Brett@bedsft.nhs.uk	01234 355 122 ext:5517
Sofia Lepore	Training and Learning Manager	Training Manager – Cross Site	Samantha.Brett@bedsft.nhs.uk	01234 355122 ext:4541
Sanya Oodian	Training Team Leader	Training Administration - Luton	Sanya.Oodian@ldh.nhs.uk	01582 (71)8014
Farrah Maqsood	Training Administrator	Training Administration - Luton	Farrah.Maqsood@ldh.nhs.uk	01582 (71)8191
Basirat Ganiyu	Training Administrator	Training Administration - Luton	Basirat.Ganiyu@ldh.nhs.uk	01582 (71)8806
Bilquees Bello	Mandatory Training Officer	Training Administration - Luton	Bilquees.Bello@ldh.nhs.uk	01582 (71)8806
Priya Sidhu	Senior Training Administrator	Training Administration - Bedford	Priya.Sidhu@bedsft.nhs.uk	01234 355122 ext:5916 / 4536
Jay Sidhu	Mandatory Training Officer	Training Administration - Bedford	Jay.Sidhu@bedsft.nhs.uk	01234 355122 ext: 3116 / 4536
Gabrielle Noel	Training Administrator	Training Administration - Bedford	Gabrielle.Noel@bedfordhospital.nhs.uk	01234 355122 ext: 3026 / 4536
Wendy Earl	Apprenticeships Lead (Cross-Site)	Apprenticeships Lead (Cross-Site)	Wendy.Earl@bedsft.nhs.uk	01234 355122 ext: 3642
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