

ESR Portal Familiarisation

User Guide



It's your ESR

This guide is intended to provide you will an overview of the My ESR Dashboard. The My ESR dashboard is available to all users and the default dashboard displayed when accessing the ESR Portal

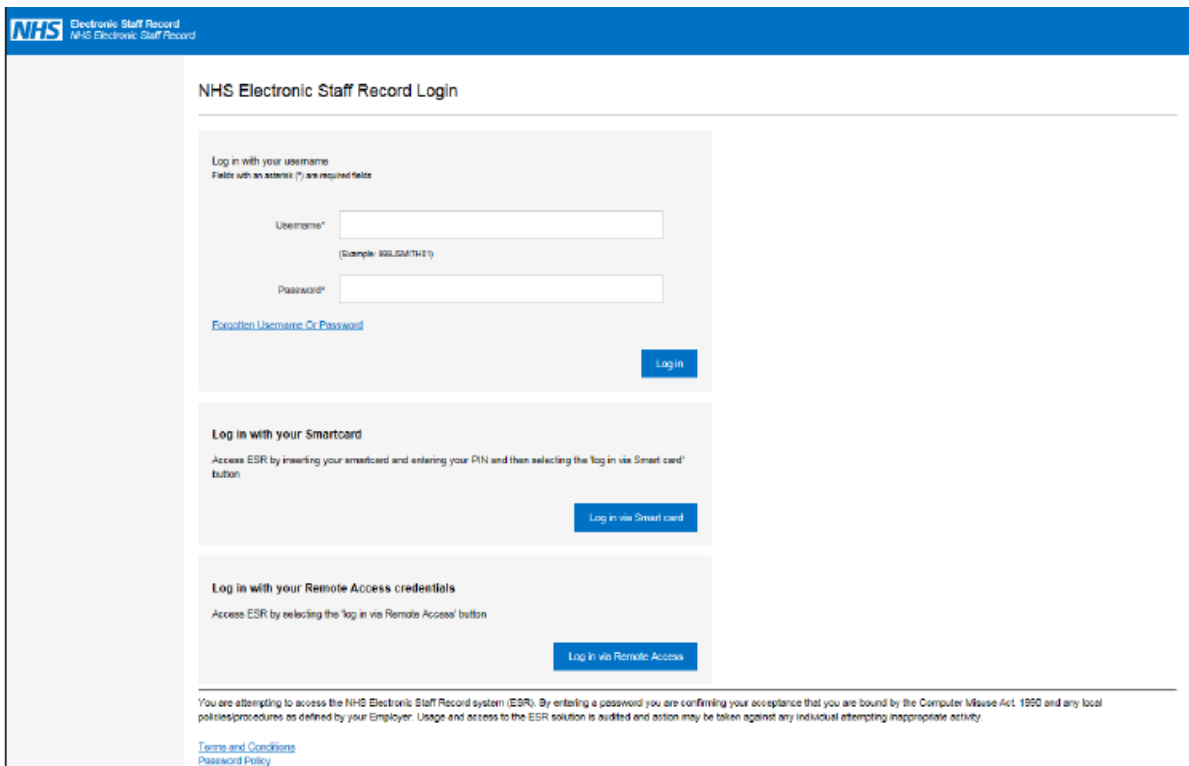
Accessing the ESR Portal

ESR Portal Login Page

The link to access the ESR Portal is <https://my.esr.nhs.uk> or you can access it via the Applications age on the Trust Intranet

You can use the link about to access the Portal via the N3 network (within the Trust) or via the Internet (remotely)

N3 Login Page – (including smartcard access)



The screenshot shows the NHS Electronic Staff Record Login page. At the top left is the NHS logo and the text 'Electronic Staff Record NHS Electronic Staff Record'. The main heading is 'NHS Electronic Staff Record Login'. Below this, there are three login options:

- Log in with your username:** Fields with an asterisk (*) are required fields. It includes a 'Username*' field with an example '(Example: 9995678123)' and a 'Password*' field. A blue 'Login' button is at the bottom right of this section. A link for 'Forgotten Username Or Password' is below the password field.
- Log in with your Smartcard:** Access ESR by inserting your smartcard and entering your PIN and then selecting the 'log in via Smart card' button. A blue 'Log in via Smart card' button is at the bottom right of this section.
- Log in with your Remote Access credentials:** Access ESR by selecting the 'log in via Remote Access' button. A blue 'Log in via Remote Access' button is at the bottom right of this section.

At the bottom, there is a disclaimer: 'You are attempting to access the NHS Electronic Staff Record system (ESR). By entering a password you are confirming your acceptance that you are bound by the Computer Misuse Act, 1990 and any local policies/procedures as defined by your Employer. Usage and access to the ESR solution is audited and action may be taken against any individual attempting inappropriate activity.' Below the disclaimer are links for 'Terms and Conditions' and 'Password Policy'.

The N3 Login Page:

- Provides a login via the entry of an N3 Username/Password
- Provides a login via Smartcard for Smartcard users
- Provides a link to the forgotten username/password page

Internet only login Page (accessible remotely)

NHS Electronic Staff Record

Log in with your credentials

Access to ESR services over the Internet has changed

If you have Smartcard access to ESR: Your username can be identified by logging into ESR with your Smartcard (over N3) and selecting the ESR Navigator, the username will be displayed in the top right hand corner of the page. Please use this username in conjunction with your existing internet password in order to access ESR services over the internet. [Click here for more information.](#)

If you access ESR over N3 with a username and password: Please use these same credentials to access ESR internet services. Your separate Internet User Name and Password used previously can no longer be used to access ESR. [Click here for more information.](#)

Fields with an asterisk (*) are required fields

Username*
(Example: 99AUSMT101)

Password*

[Forgotten Username or Password](#)

Log in

You are attempting to access the NHS Electronic Staff Record system (ESR). By entering a password you are confirming your acceptance that you are bound by the Computer Misuse Act, 1990 and any local policies/procedures as defined by your Employer. Usage and access to the ESR solution is audited and action may be taken against any individual attempting inappropriate activity.

[Terms and Conditions](#)
[Password Policy](#)

To be able to access Portal from outside the Trust, once logged into the system via the N3 route you must click on the **Manage Internet Access** ✖ This will then grant you remote access via <https://my.esr.nhs.uk> internet address or by downloading the MyESR app from your app store.

For those accessing the portal in the Trust N3 with a smartcard that want to access My ESR remotely, you will need to create a password via the above Manage Internet Access button.

My ESR Dashboard

The My ESR Dashboard is the default view for all users when accessing the portal.

The screenshot displays the My ESR Dashboard interface. At the top, there is a blue header with the NHS logo, the text 'Electronic Staff Record Robert Jones & Agnes Hunt Orthopaedic Hospital NHS FT', a search bar, and user information including 'Admin' and a notification badge with '56'. A 'Manage Internet Access' button is also visible in the top right.

The dashboard is organized into several sections:

- My Role:** A blue sidebar menu with 'My ESR' selected.
- My Pages:** A vertical list of navigation options including Dashboard, Portal Content, ESR Navigator, My Personal Information, My Pay & Rewards, My Learning, My Compliance & Competency, My Absence, My Appraisals and Reviews, My Employment, My Property Register, My Talent Profile, and Manage Internet Access.
- Announcements:** A large banner with the text 'Welcome to the ESR Portal' and 'It's your ESR'. Below the banner is a 'View All (2)' link.
- My Payslip:** A section for viewing or downloading the latest payslip(s) or accessing ESR to view the full payslip history. It includes a 'Pay date: 31-Jul-2017' and a 'View Payslips' button.
- My Compliance:** A section showing an 'Assignment' dropdown, a 'Percentage Compliance: 81%' progress bar, and a 'View Compliance Matrix' button.
- My Personal Information:** A section for updating details, including fields for Name, Address, Mobile, Work, and Position, and an 'Update My Details' button.
- My Total Reward Statements:** A section showing the 'Tax year: 2015-2016' and a 'Launch my TRS' button.
- My ESR Calendar:** A section showing the current date as 'Wednesday July 26, 2017' and an 'Information' box stating 'You have no classes in the next 7 days.'

Portlets

Portlets provide easy access to your information. These are:

- Announcements
- My Payslip
- My Compliance
- My Enrolments and e-learning
- My Total Reward Statement
- My Personal Information
- My ESR Calendar

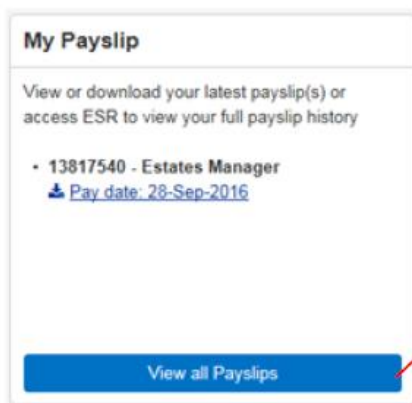
Announcements

The Announcements portlet can contain both local and national messages.



The latest 20 messages will rotate automatically. A 'View all' link is available to access a detailed list of all messages. If you click on a particular announcement you will be taken to the appropriate external page relating to that announcement.

My Payslip



Your most recent payslip will be displayed on the first page of this portlet. New generated payslips since you last logged into the portal will be highlighted with a 'New' Icon.

You can download payslips from this portlet which, once download, will be available in a PDF format. In some cases, before you can open your payslip, the PDF will be downloaded to your computer. Please ensure that you save your payslip in a secure area and move the downloaded file if you are using a public or shared computer.

For more information, you can click on the 'View all Payslips' link which will take you directly to the ESR Online Payslip page where your full payslip history is available.

My Compliance

My Compliance

Assignment:
1381754D - Estates Manager

Percentage Compliance: 4%

[View Compliance Matrix](#)

Compliance and Competency

Employee Name: [View Data](#)
Employee Number: 20000523

Compliance: All Competencies Awaiting Approval

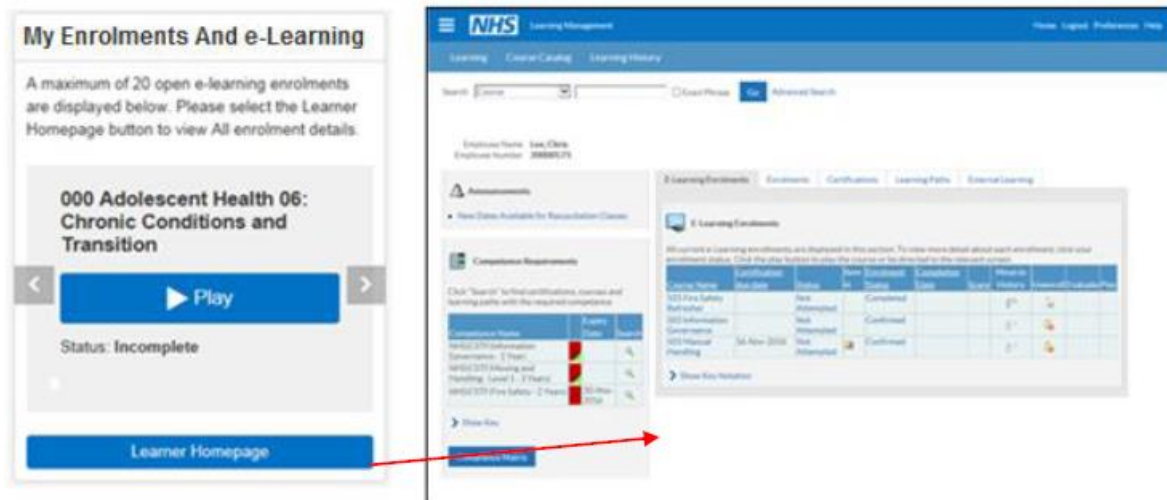
Compliance Percentage: 44.4%

Details	Competency Name	Competency Level	Min	Req	Essential	Expiry Date	Compliance Status	Find Learning	CBT
Show	NHS/CFT/Equality, Diversity and Human Rights - 3 Years	1	1	Y		31-Jan-2020	Green	🔍	🗑️
Show	NHS/CFT/Fire Safety - 2 Years	1	1	Y		30-Nov-2016	Green	🔍	🗑️
Show	NHS/CFT/Infection Prevention and Control - Level 2 - 3 Year	1	1	N		31-Jan-2018	Red	🔍	🗑️
Show	NHS/CFT/Infection Governance - 1 Year		1	Y			Red	🔍	🗑️
Show	NHS/CFT/Moving and Handling - Level 1 - 3 Years		1	Y			Red	🔍	🗑️
Show	NHS/CFT/Dealing with Children - Level 2 - 3 Years	1	1	N		31-Jan-2020	Green	🔍	🗑️
Show	NHS/CFT/Communications Core	3	3	Y		Not Expiry	Red	🔍	🗑️
Show	NHS/CFT/Health, Safety and CS Core	2				No Expiry	Blue	🔍	🗑️
Show	NHS/CFT/Service Improvement Core	3		N			Red	🔍	🗑️

This portlet provides a compliance summary across all of your assignments.

Clicking on the View Compliance Matrix button will launch the Compliance and Competency page where you can view your Compliance Status in more detail.

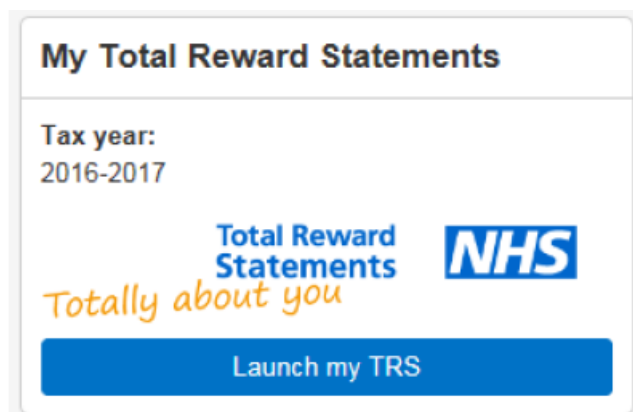
My Enrolments and e-learning



This shows the e-learning training courses you are enrolled in. Up to a maximum of 20 courses will be displayed.

Clicking on the 'Play' button will play e-learning courses. These will open in a new window.

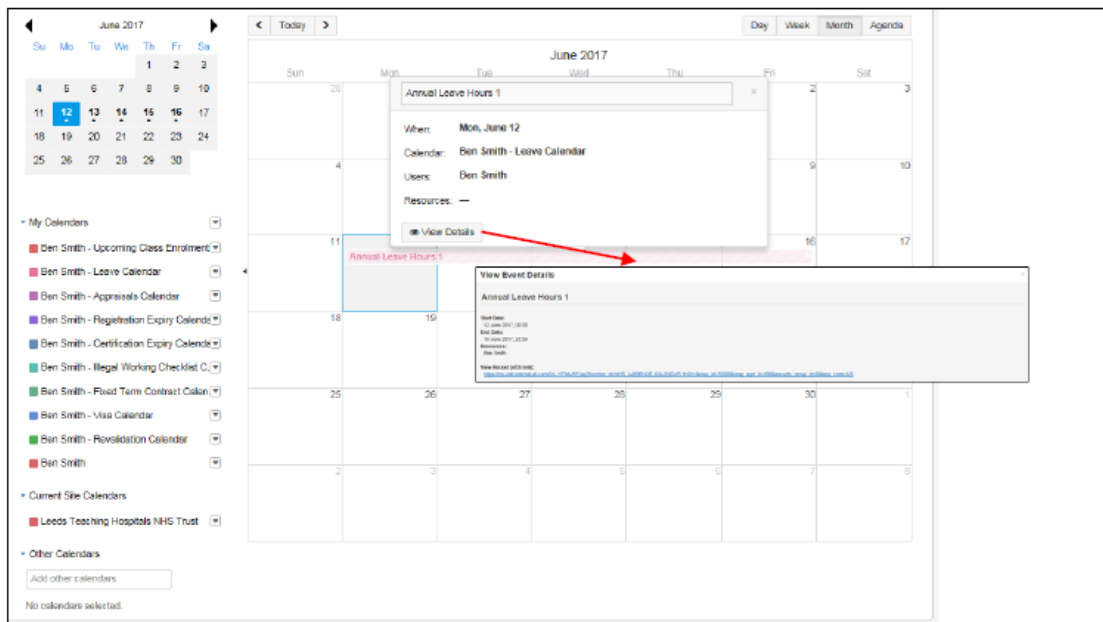
My Total Reward Statement



If you click on 'Launch my TRS' it will open a new window showing your Total Reward Statement

You can view further detail by clicking the View My Calendar Button.

Clicking on an event will give you a summary of the event details.



Clicking the [View Details](#) button will provide further details of the event including, where possible, a link to the page in ESR where the information can be viewed:

My Pages

The information held in the portlets can be expanded upon in the 'My Pages' section

The screenshot displays the NHS Electronic Staff Record (ESR) interface. On the left, a blue sidebar contains the 'My Pages' menu, which is highlighted with a red border. The main content area features an 'Announcements' section with a banner that reads 'WELCOME TO YOUR ESR'. Below this, there is a 'My Compliance' section showing an assignment for '90931774 - Position 7583514' with a 'Percentage Compliance' of 66%. A 'View Compliance Matrix' button is present. The 'My Total Reward Statements' section shows the tax year '2016-2017' and includes the NHS logo and the slogan 'Totally about you'. At the bottom right, a 'My Personal Information' section is partially visible.

Portal Content

- Provides details of Announcements
- Local Links to current RJAH vacancies on NHS Jobs, link to e-expenses, health roster

My Personal information

- Expands on the My Personal Information portlet. Section to add in qualifications and via registrations and memberships details

My Pay & Rewards

- Payslips and TRS Statement can be found here as well as Online P60

My Absence

- Provides details of absence for sickness, special leave and maternity/paternity

My Employment

- Provides your post history at the Trust, length of service, supervisor details.

Portal Navigation

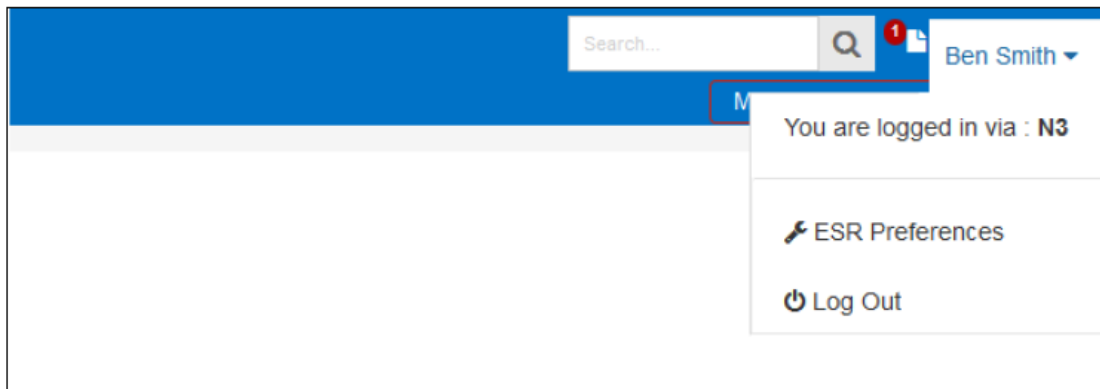
Header



The header bar contains a portal search bar which allows you to search for portal content. The search will be performed within the Announcements portlet and the Local Documents and Media folder.

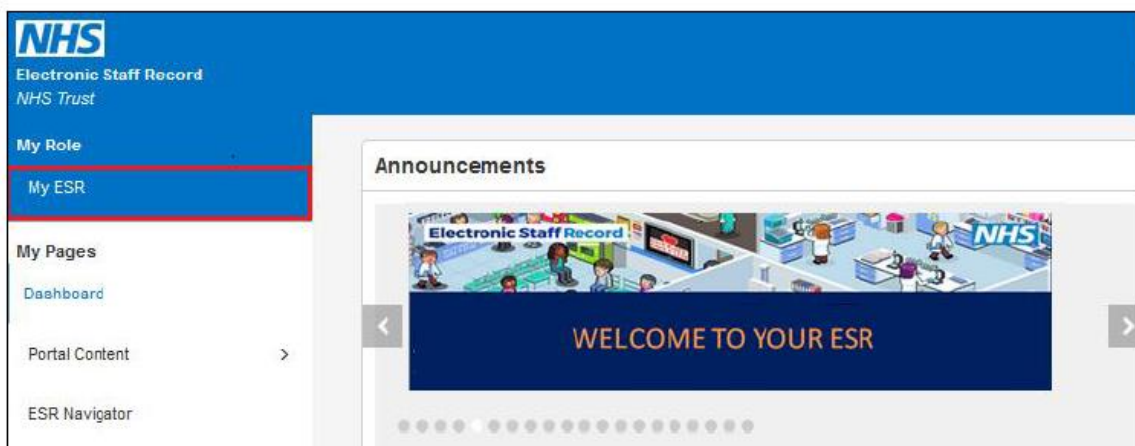
The Notifications icon will display a count of open ESR notifications, if applicable.

All users can click on their name to sign out or access the ESR Preferences page within ESR. You will also see an indicator as to whether you are logged in via N3 or the Internet.



Navigation Bar

The options available in the menu are based on the access you have to ESR.



The My ESR dashboard is the default dashboard for all users. Users with access to additional responsibilities will have more dashboards available to them, e.g. Managers.

Clicking on 'Dashboard' will return to you the portal dashboard view.