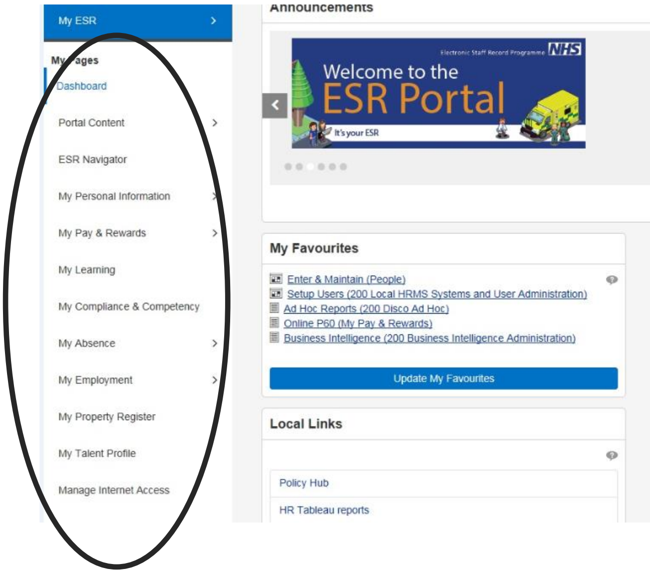
How to use ESR self-service

This guide will show you how to use the various elements on Self-Service.

From the Portal all the options for viewing Self-Service are listed on the left hand side:



This guide will go through each of these options. If there is an arrow next to the option then that means that it is broken down into different sections, clicking the arrow will reveal these.

When navigating through these different areas, you can return to the Portal home page at any time by clicking on the Portal icon at the top right hand side of the screen:

Contents

1. My Personal Information

To view the different kind of personal information we hold on the ESR system click on the arrow – the selection will then expand to show several different areas.

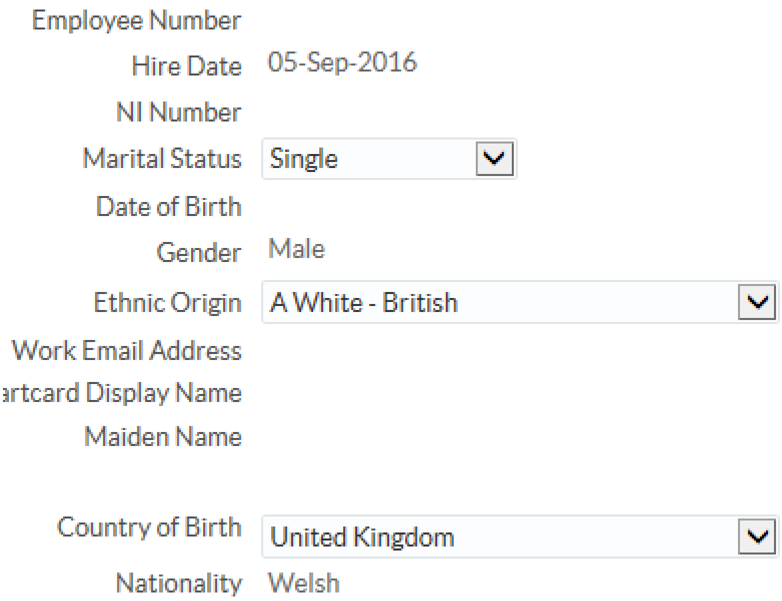
1a. Personal Information

Here you can view basic information including name, date of birth, NI number, phone numbers, and address. Some of this information can be corrected if it is inaccurate or out of date.

To amend your marital status, ethnic origin or country of birth, and also view your continuous service dates, click on 'View and Update' within the Basic Details section. You will now have to choose between 2 options – if your marital status has changed then make sure the 'Enter new information because of a real change to the current details' option is checked, otherwise choose 'Correct or complete the current details' and click 'Next'.

To view your continuous service dates, click on the blue arrow next to 'Show Additional Information:

The fields that can be amended have a drop down menu next to them:



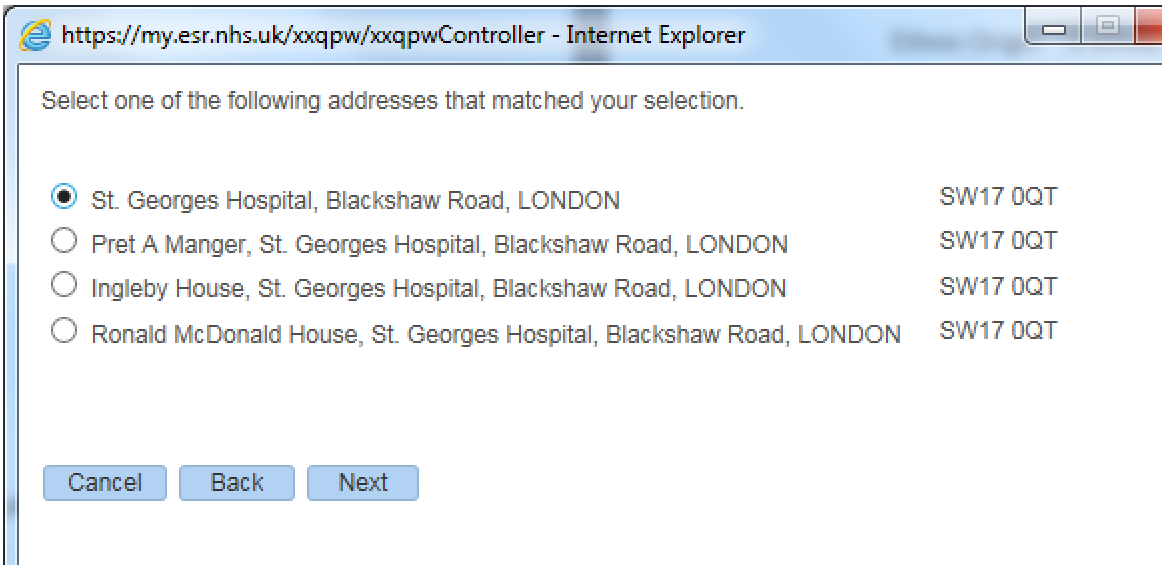
Click on the arrow and choose the correct value from the list, then click ‘Next’. You will come to the review page – anything you have changed will appear in the right hand column with a blue circle next to it. Once you are happy, press Submit – otherwise, press ‘Cancel’ or ‘Back’.

To update your phone number, click on the ‘Update’ option in the Phone Numbers section and follow the instructions.

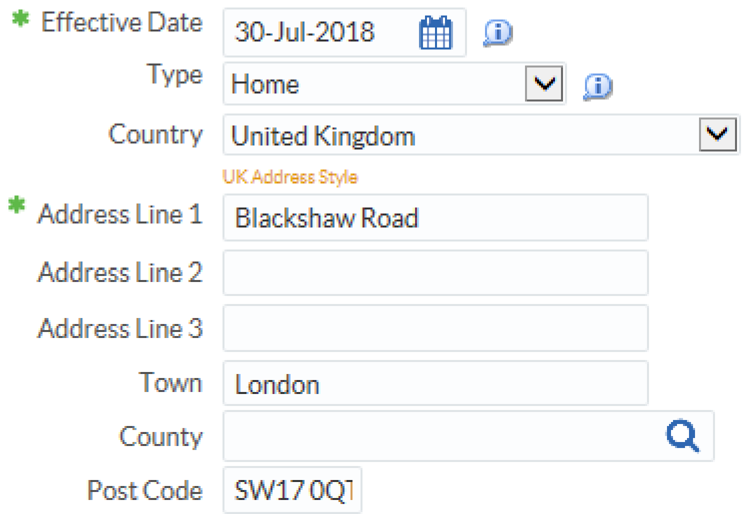
To update your address, click on the ‘Update’ option in the Addresses section. You will now have to choose between 2 options – if you have recently moved to a new address then make sure the ‘Enter a new address if you have moved’ option is checked, otherwise choose ‘Correct or amend this address’ and click ‘Next’.

If you have moved then enter the date you moved in the ‘Effective Date’ field (this option will not be available if you chose to amend the existing address). You can enter the address manually but it is advised you use the ‘Find Address’ option. Click on the ‘Find Address’ blue box:

This will bring up the address finder box. Enter the building number and postcode and click ‘Next’. If there are several options then you will have to choose the correct one:



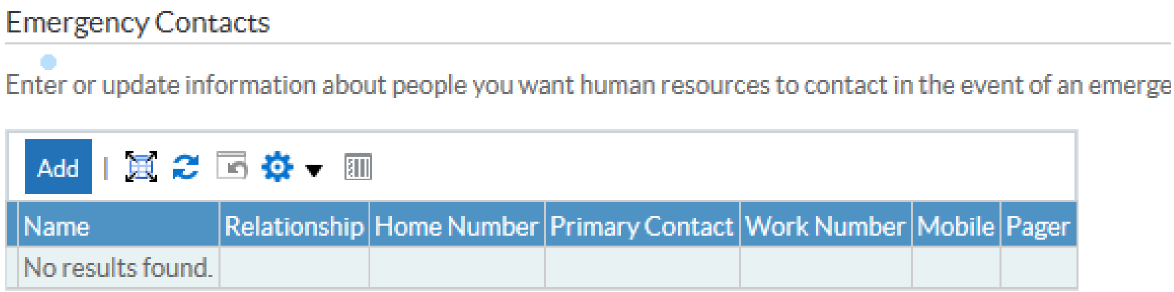
Click 'Next', then you will be asked to confirm that the address is correct. Click 'OK'. The address will now be populated:

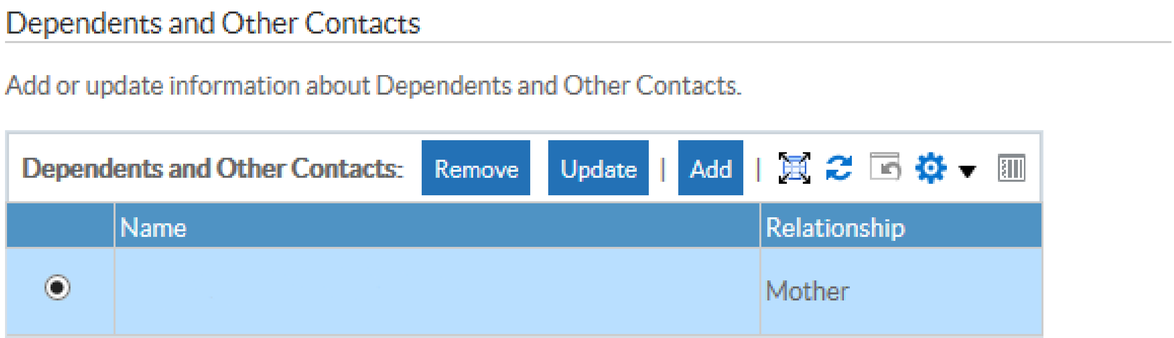


Click 'Next' and you will come to the review page – anything you have changed will appear in the right hand column with a blue circle next to it. Once you are happy, press Submit – otherwise, press 'Cancel' or 'Back'.

1b. Contacts

Here you can review and if necessary update the emergency contact information held.





If there is no Emergency Contact set but there is someone designated as 'Dependent and Other Contact' then you don't need to add an Emergency Contact, as in the event of an emergency Human Resources will use the person already recorded.

To ***remove*** a contact, click 'Remove' and enter an end date, then click 'Next'. On the Review page, click 'Submit'.

To ***update*** a contact, click 'Update' to get to the Update page. Amend any fields as necessary, then click 'Next'. On the Review page anything you have changed will appear in the right hand column with a blue circle next to it. Once you are happy, press Submit – otherwise, press 'Cancel' or 'Back'.

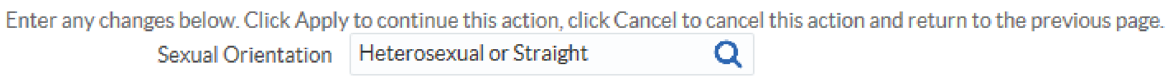
To ***add*** a contact, click 'Add' and then enter the details as required – a yellow star next to a field means that it is mandatory. If the address is different to your own, uncheck the 'Use my address for this person' box and then enter the address. Once created, click 'next' to get to the review page and then click 'Submit'.

1c. Qualifications

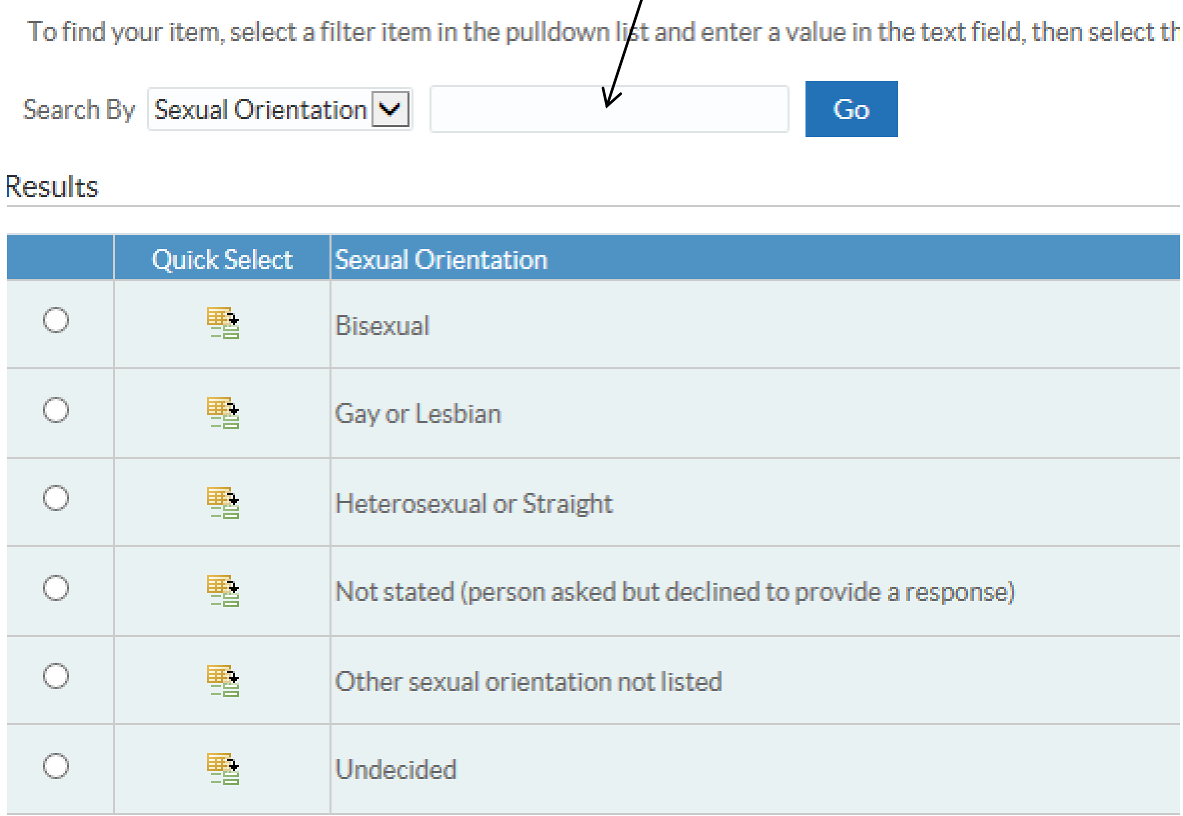
Any qualifications that are recorded on ESR will be shown here. This is view-only – if the details are incorrect please contact your HR Advisor in the first instance.

1d. Sexual Orientation

Click to view the sexual orientation recorded on the system – this will have been taken from your application form. To update this please click 'Update' and then click on the magnifying glass to the right of the text:



In the box that appears delete the text from the free text field and click 'Go'. The list of values will then appear:



Choose your preferred answer by clicking on the adjacent Quick Select icon, then click 'Apply', then 'Submit'.

1e. Religious Belief

Click to view the religious belief recorded on the system – this will have been taken from your application form.

To amend this please follow the same steps as to change your sexual orientation on the system.

1f. Disability Information

To ***add*** a disability click on ‘New’, enter an effective date, use the magnifying glass to determine a Category, then click ‘Apply’.

To ***amend*** a disability, click on ‘Update’ and choose whether you are amending due to a change in circumstances or because you want to correct existing information. On the update page amend whichever details as necessary, then click ‘Apply’.

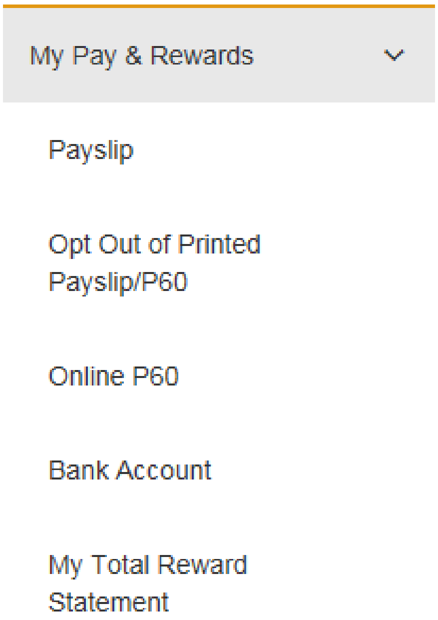
1g. Registrations & Memberships

Here you can view any professional registrations and memberships you might possess. Please note that only ones directly related to your role are recorded here. NMC and GMC registrations are linked to those Membership Bodies, so once you update your expiry date or revalidation dates with them then these fields will automatically update on ESR. If any of this information is incorrect, please contact your HR Advisor in the first instance.

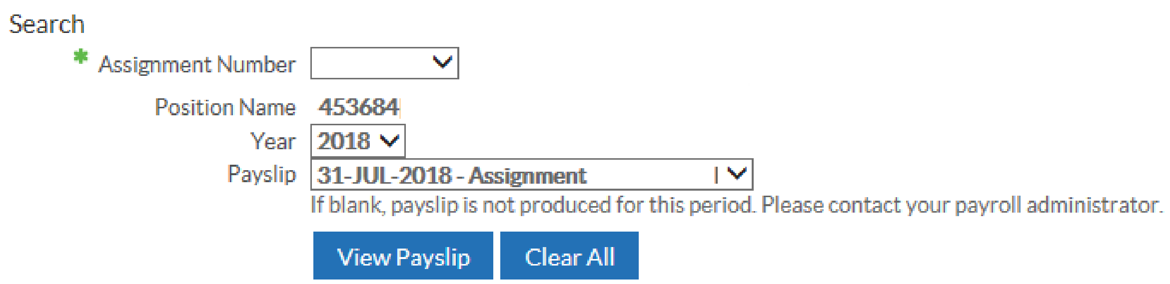
2. Pay and Rewards

2a. View Payslip

The easiest way to view your payslip is to use the portlet on the Portal homepage which gives a direct link to your latest payslip. However you can also access payslips via the menu option under ‘My Pay and Rewards’:

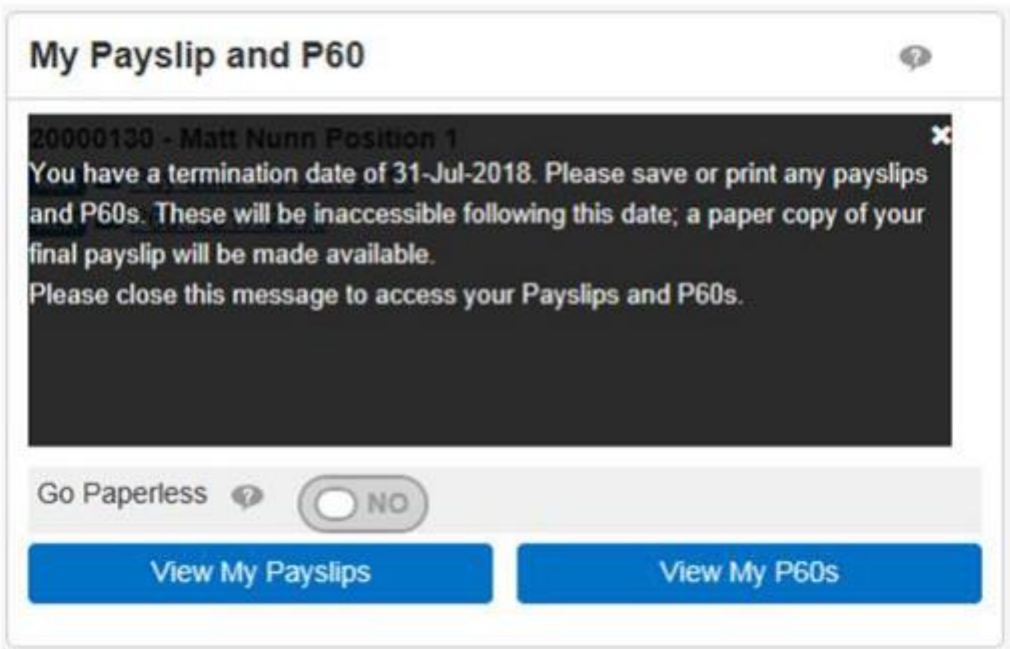


Click on ‘Payslip’ and you will be taken to the Payslip screen:



Here you can choose which payslip you want to view. It will be defaulted to your most recent payslip, but to choose a payslip for a different assignment (for example if you have a secondary bank assignment) or a payslip from a different month or year then use the dropdown options to select these. To view your payslip click on ‘View Payslip’ – this will open in a pdf document so you can save it and print it off at will.

Access to payslips is only available to active employees – once an employee leaves the Trust they will no longer be able to access this function. Employees are therefore strongly advised to download at least their last 3 payslips before leaving the Trust. Once a leavers form has been processed and a termination date entered into ESR, a message will be displayed in the Payslip portlet on the Portal:



To remove this notice click on the ‘x’ at the top right of the banner. This notice will appear each time the employee logs into self-service.

2b. Opt Out of Printed Payslip/P60

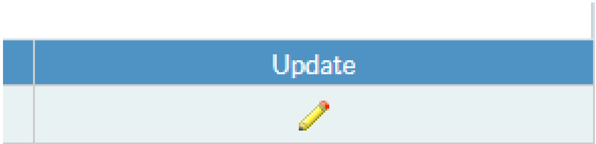
As the Trust has already opted out of printed payslips then this option is not relevant.

2c. Online P60

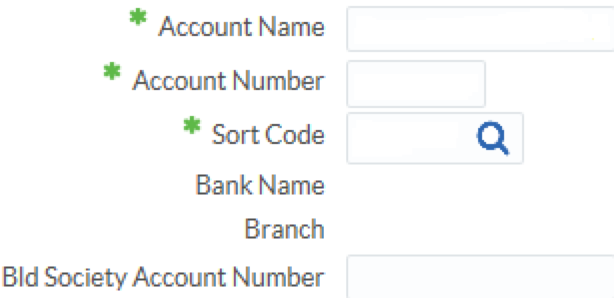
Here you can view and download a copy of your P60. Clicking this option will take you to the online P60 page where you will need to choose the tax year that you want to view, and then click on 'View Report' to download.

2d. Bank Account

Employees can use this function to change the bank account that their salary is paid into. Click on the 'Bank Account' option to be taken to the 'Manage Payroll Payments' screen, then click on the 'Update' link:

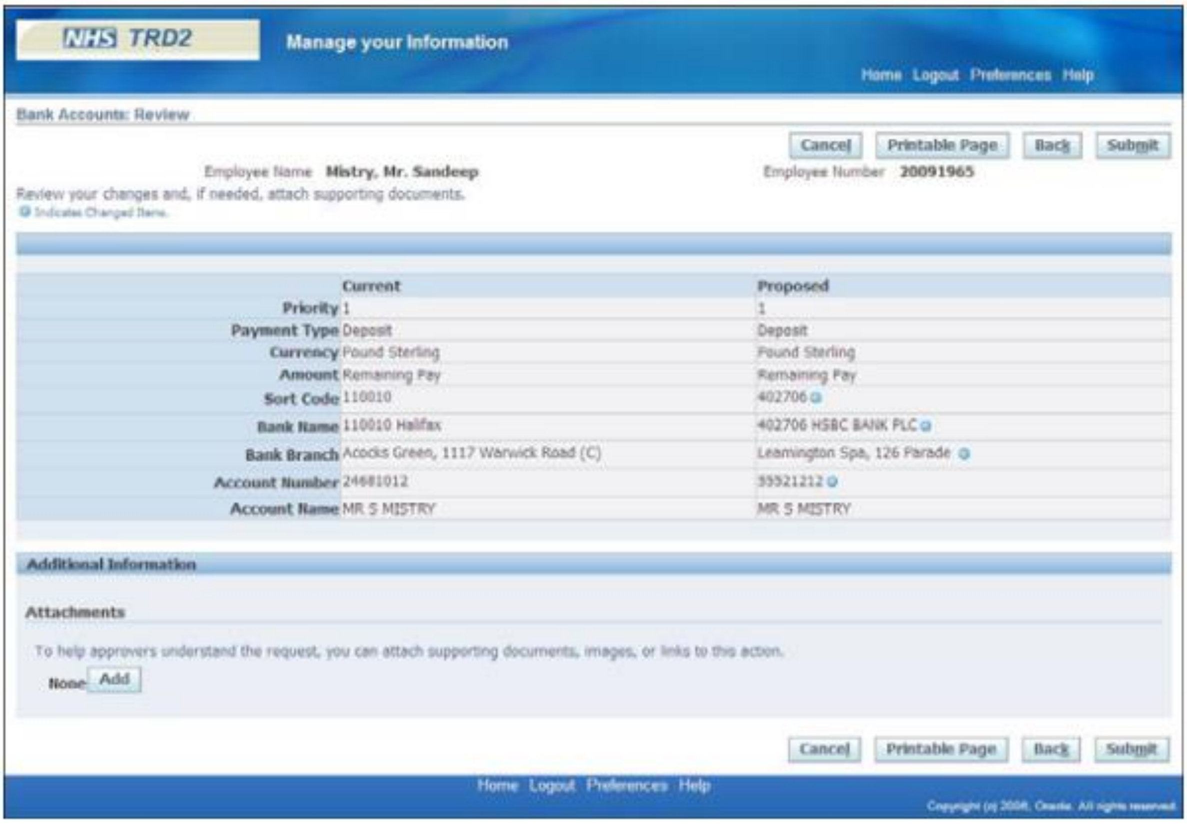


You will now be able to view the bank account details held on ESR:



NB: CHANGING BANK ACCOUNTS WHILST THE PAYROLL IS RUNNING COULD IMPACT YOUR PAY, THEREFORE WE ADVISE YOU TO ONLY USE THIS FUNCTION WITHIN THE FIRST 2 WEEKS OF THE MONTH

Delete the information that is already held and then enter a new account name (if necessary), account number and sort code. Click on the magnifying glass in the sort code field to then bring up a new window with the bank name and branch and click on 'quick select' to choose the correct option. Once the changes have been made, click 'Apply' to review the changes – a blue dot will highlight the changes that have been made:



Click ‘Submit’ to save your changes.

2e. My Total Reward Statement

This is a link which automatically logs you into the external Total Reward Statement website. Here you can find information about your pension. You can only access your Total Reward Statement if you were employed by St Georges on the 1st April of the current financial year.

3. My Learning

This section is used to display training modules completed – however St Georges don’t use ESR to record this as it is all done via Totara. Therefore this section will either be empty or contain incomplete information, and as such should be ignored.

4. My Compliance and Competency

As with ‘My Learning’, this is not recorded within ESR and so this section should be ignored.

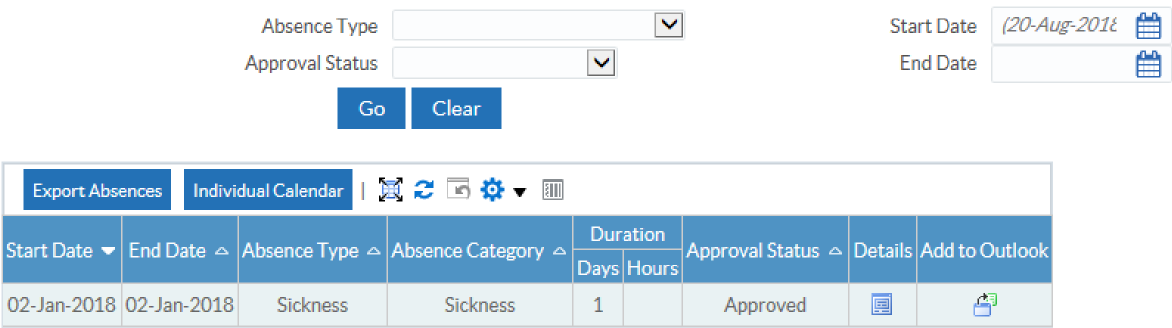
5. My Absence

5a. Absence calendar

You can view certain absences by either year or month. Absence information isn't recorded directly onto ESR, instead it is recorded on the Health Roster system and then uploaded into ESR once a month, so any recent absences may not be showing yet. Annual leave is not uploaded into ESR therefore it will not show in the absence calendar.

5b. Absence Summary

This shows all your absence in a table format:



You can search for any specific absences using the fields and drop downs, or export into a csv file using the 'Export Absences' option.

6. My Employment

6a. Employment Information

This screen will show details of your service history within the Trust. The top section shows details of your current employment profile:

Assignment Number – this is your unique payroll number

Assignment Start Date – this is the date since the last change in assignment details. This could be the date of your last increment, or the date since you changed working hours, or grade.

Assignment End Date – as the information is for your current assignment this should be blank, unless you have a change in your near future that has already been inputted (e.g. termination date).

Job – this will be your staff group and job role.

Organisation – this is the department/cost centre that you currently work in

Location – this is the site on which you are based.

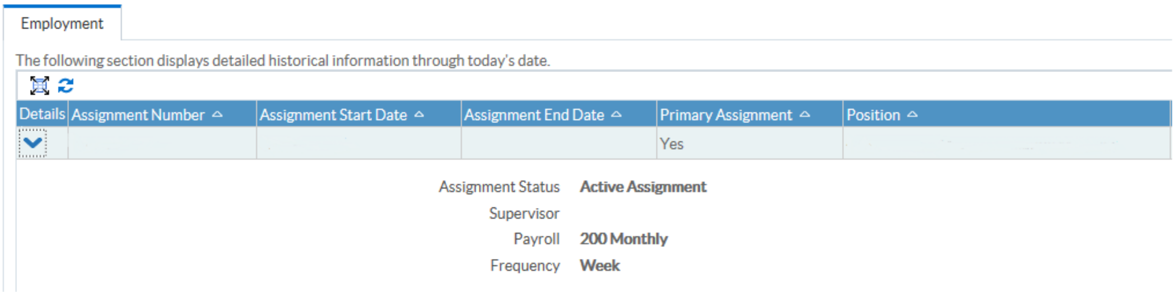
Supervisor – this field is not maintained within ESR so could contain incorrect information.

Service in Current Employment – the number of years you have worked in post

Email Address – your work email address

Applications exist? – this will show if you have any live job applications on ESR

The following section has details of all the posts you have worked. It is based on the assignment start/end date which as advised above can be affected by any changes to your record, so if you haven’t even changed post but can still see several different lines then it could be the dates that you received your increment. Clicking on the blue arrow to the side can reveal a bit more information:



7. My Property Register

The property register function within ESR is not used therefore this section will be blank and should be ignored.

8. My Talent Profile

The Talent Profile function within ESR is not used therefore this may contain incorrect information and should be ignored.

9. Manage Internet Access

This is where smartcard users can set and reset their password for home access to the self-service function.