SHSC ESR & Training User Guide September 2018

ESR General Facts

ESR (Electronic Staff Records) is the system used by a majority of NHS trusts to keep track of employee information. This includes personal information, pay information, mandatory training information and other types of staff information.

All SHSC staff are encouraged to consult their profile and check the accuracy of the information held. Staff can also choose to opt out of paper payslips using the ESR portal.

Training information including which topics are mandatory and expiry dates are accessible through ESR. ELearning as a way to complete training is available on the Oracle platform through ESR.

Access from non-SHSC devices (see ESR Access User Guide)

This is now enabled as standard for users accessing ESR using a Username and Password combination. Smartcard users will need to set up a password for remote access, and will only have access to limited functionality (not affecting the ESR Spine). Remote Access allows you to set up access the ESR from a non-trust computer. For example, if you regularly work at GP surgeries, in other trusts, at university, or you would like to log on and view your online payslips form home, you are able to do this from your most convenient site rather than coming to an SHSC site.

Once you have created your password please use the following web link to access ESR: https://my.esr.nhs.uk/

Please be aware the support you can access when using a non-SHSC device will be different. Start by using the troubleshooting guidelines.

Help and contacts

- For any ESR related queries, ring 011422 (63301) then press 2 and 2 or email workforce@shsc.nhs.uk

- If your query is training or E.Learning related please ring 011422 (62233) or email training@shsc.nhs.uk

How to use my ESR Portal

The ESR Portal is a way for you to view information about yourself. You can manage your information for HR & Training related purposes. You can access the content of the portlets by clicking on the blue title under each of them.
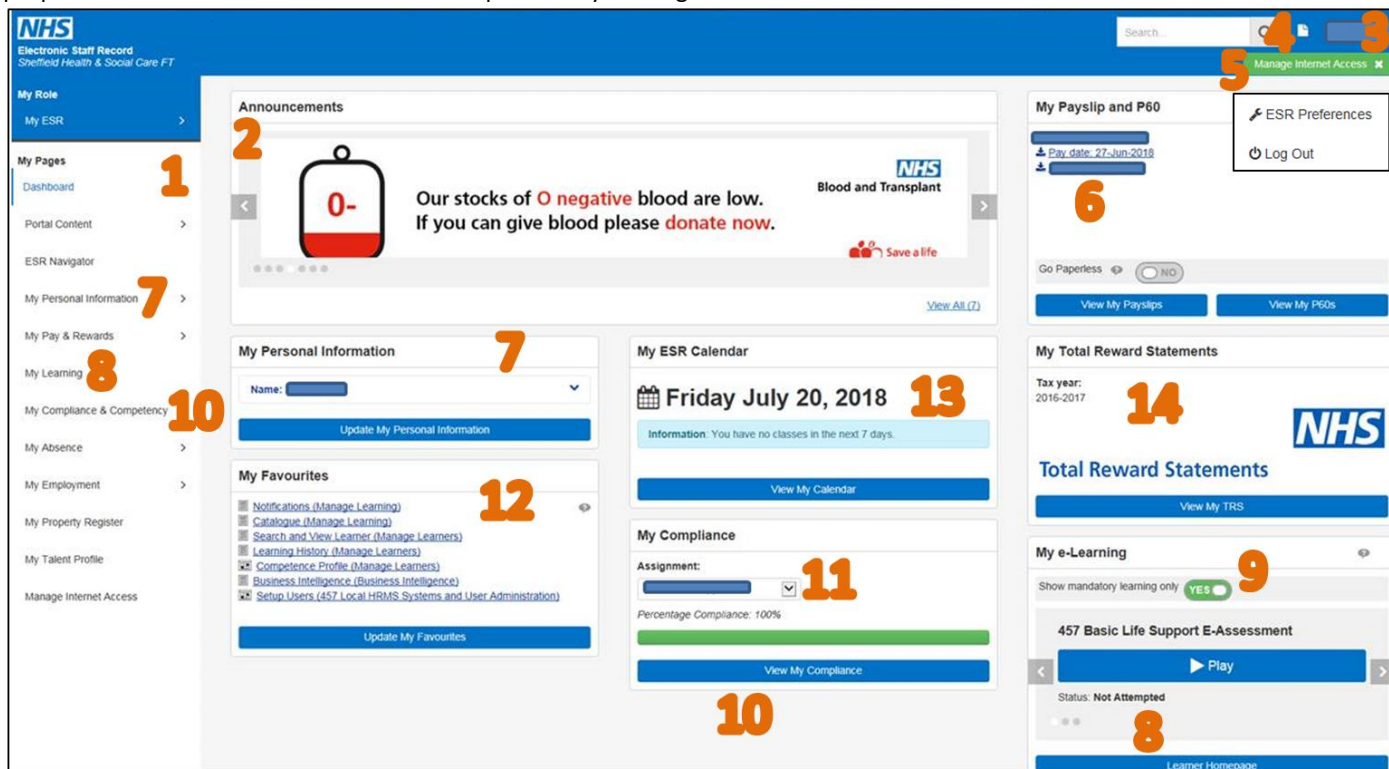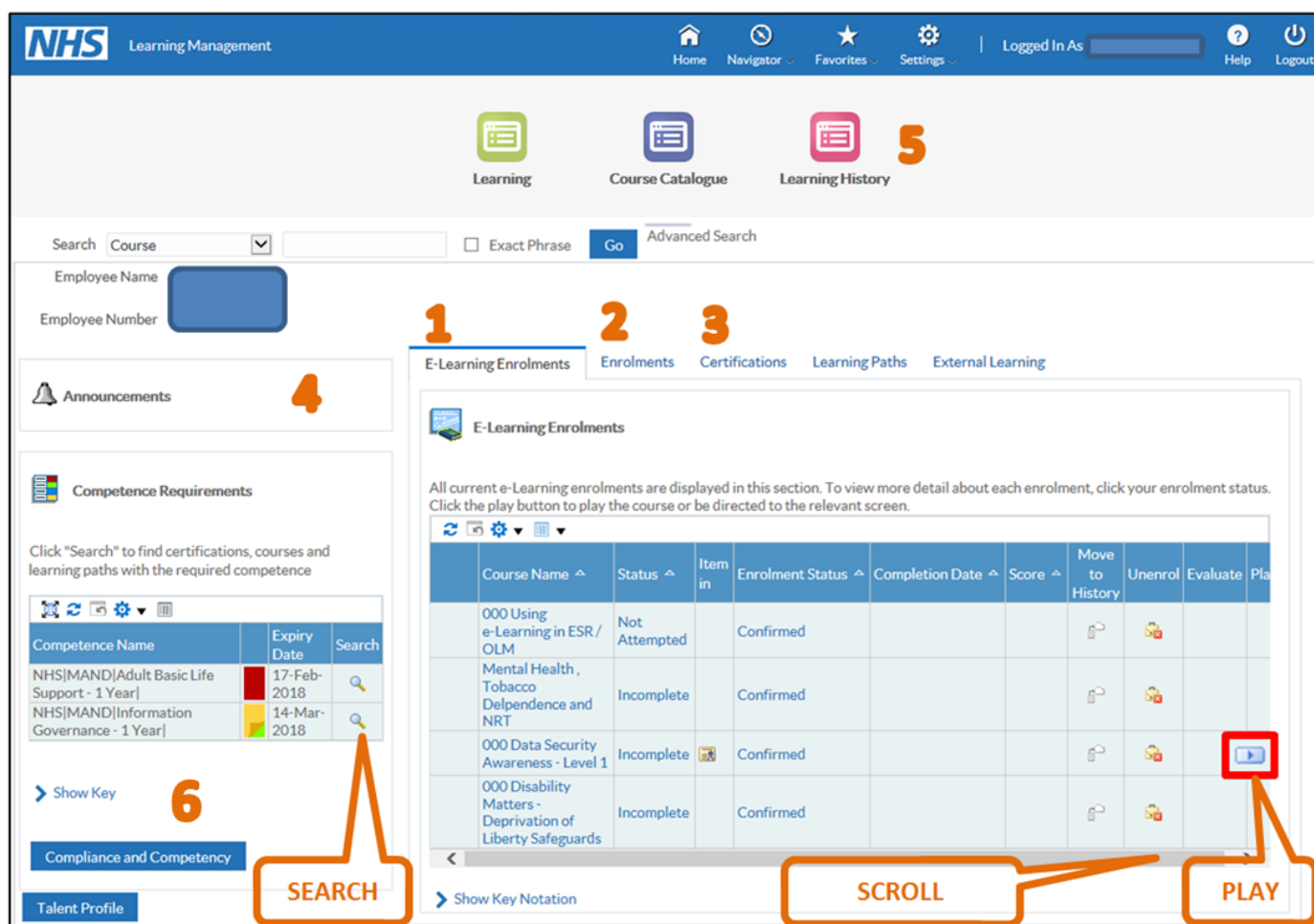

1. **ESR Navigator**: The ESR Navigator shows what you can access on ESR. Select your ESR role if you have more than one. Expand and collapse the categories using the arrows next to the headings.

2. **Announcements**: Latest news, view different announcements by clicking on the left and right arrows.

3. By Clicking on your name, make the link appear to your "ESR Preferences" and the "Logout" button.

4. The white page is a link to your **ESR notifications**. You may receive emails letting you know you have notifications to access.

5. "**Manage Internet Access**", this is useful for ESR Smartcard users, explained in the ESR Access Userguide.

6. "**Payslips portlet**", go paperless using this and consult your payslips. More information in the ESR & Workforce User guide

7. "**Personal information**", collapse and expand using the arrow. More information in the ESR & Workforce User guide

8. **"My Learning" page** can be accessed there, more information on "How to use my Learning Home Page"

9. **E.Learning enrolments:** View up to 20 E.Learning enrolments and play from this portlet, if you use the "mandatory training only" function, the portlet will show only E.Learning connected to valid certifications. We recommend using this.

10. **"My Compliance and Competency" page** is explained more in depth: "How to use my Compliance Matrix"

11. "**My Compliance**" shows at a glance your percentage of compliance on your primary assignment. If you have more than one assignment, use the drop down menu to select the assignment you want to consult. You may have different training requirements for your different assignments resulting in a different compliance status.

12. Set **favourites** in this portlet so the pages you access most often appear on your Dashboard.

13. "**ESR Calendar**": you can view key dates related to events that are kept track of on ESR, more information in the ESR & Workforce User guide

14. "**Total Rewards Statements**" portlet: use this to launch your TRS page, including pension information.

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How to use "My Learning" Page (or Learner Home Page)

The Learner Home page provides a snapshot view of your learning. You can monitor the competencies you require, and search for learning which will deliver these. You can play E-Learning, view classes you are enrolled in, view learning certifications you are subscribed to.

1.   **E.Learning Enrolments:** This lists your E.Learning enrolments; Use this [▶] to play E.Learning. You may need to scroll across depending on the size of your screen. How to enrol on an E.Learning course? If you are completing mandatory training on E.Learning, make sure you are subscribed to a certification.

2.   **Enrolments:** This tab lists your face to face courses enrolments and includes details for date, times and location. This also has an "add to Outlook" button to add the course to your electronic diary.

3.   **Certifications:** The Learning Certifications tab lists your subscribed certifications. You can search and subscribe to Certifications using the Competence Requirements **(7)**.

4.   **Announcements:** This will list announcements and allow to access notifications you have not viewed.

5.   **Learning History:** Holds information on courses attended since starting employment with SHSC. More on this here.

6.   **Competence Requirements:** Displays competencies requiring action. Shows if action towards the competence is underway - displaying a green corner of the red or amber tile. Search function allows the learner to find catalogue items delivering the competence. This can be used to navigate to the "Compliance and Competency" Page.

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Search and View Learer: Compliance and Competency

TIP Enter any changes below. Click Add Competencies to add a new competence, or click Edit to update an existing competence. Click Review and Submit to finalise your changes, or click All Competencies to see a chronology of your competence record. WARNING: If a Competence End Date is not entered when the Competence Profile is updated, a validated End Date will be entered, based on the Competence Renewal Period. If a Competence End Date is entered, this will be saved on the Competence Profile.

Employee Name
Employee Number

7 | **6**

Compliance | All Competencies | Awaiting Approval

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

1 Go Compliance Percentage **95.5%**

2 Required Competencies Only

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

Export | Printable Page **5** Rows 11 to 37

Details	Competency Name ▲	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning	Ed
›	NHS|MAND|Infection Control - Level 1 - 2 Years|				10-Oct-2018		🔍	✎
›	NHS|MAND|Infection Control - Level 2 - 2 Years|				10-Oct-18		🔍	✎
›	NHS|MAND|Information Governance - 1 Year|			Y	05-Apr-2018		🔍	✎
›	NHS|MAND|Medicines Management Awareness - 3 Years|			Y	01-Dec-2019		🔍	✎
›	NHS|MAND|Mental Capacity Act - 3 Years|				24-Aug-2019		🔍	✎
›	NHS|MAND|Mental Capacity Act Level 2 - 3 Years|			Y	24-Aug-2019		🔍	✎
›	NHS|MAND|Mental Health Act - 3 Years|			Y			🔍 **3**	✎
›	NHS|MAND|Prevent WRAP - 3 Years|			Y	02-Dec-2018		🔍	✎
›	NHS|MAND|Preventing Falls - 3 Years|			Y	10-Oct-2019		🔍	✎

4 (expiry date marker)

1. More than one assignment; Use drop down menu to select training profile for each assignment. Click "Go" to process request.

2. To display only subject lines mandatory to your role; Tick "Required Competencies Only" box. Click "Go" to process request.

3. Looking glass symbols to navigate to required learning. E.Learning enrolment; Face to face enrolment.

4. The expiry date for each subject is displayed next to the compliance status.

5. "Printable Page" button allows to use this as proof of training for external purposes (e.g. revalidation).

   o Click "Show Key" button below the list of subjects
   o Click "Printable Page" button above the list of subjects
   o A new window opens. Right click on the new window.
   o Click "print" or "Print Preview" in the drop down menu.
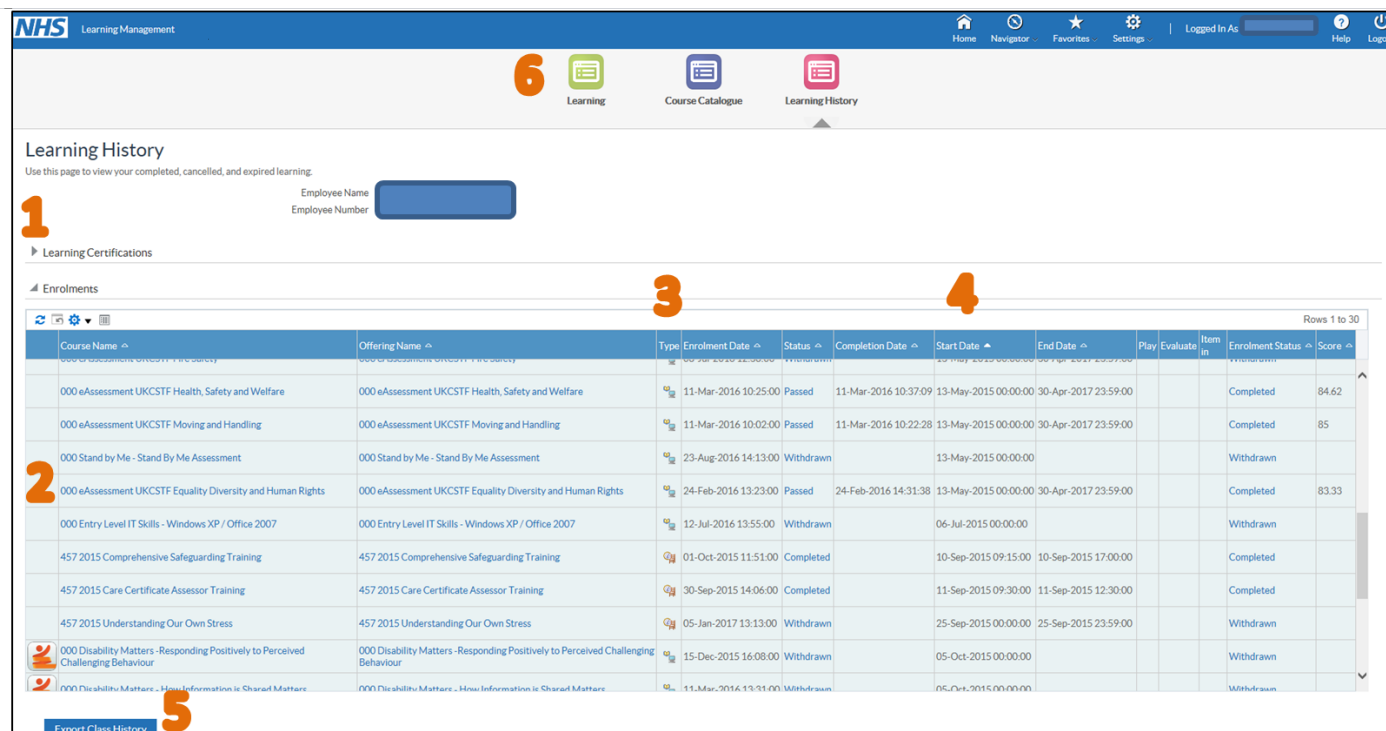
   Print...
   Print preview...

6. "All Competencies" this page will show you all the competencies that have been allocated to your record, even if they have expired. This will not match the competence with a requirement. More on competencies.

7. "Compliance": this page shows your training status at the current date, this cannot be used as a training history.

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How to use my "Learning History" Page

1. Use the grey arrows next to the headings to expand or collapse the list of enrolments.

2. The "Enrolments" list includes details of the courses with enrolments, withdrawn enrolments and not attended enrolments

3. The enrolment type symbol represents online courses or face to face courses.

4. The white arrows next to the headings can be used to sort (by date or alphabetically). "Completion Date" will only be populated for online courses that have been completed. "Completion Date" for a face to face course is the "Start Date".

5. "Export Class History" to export this table into an Excel document.

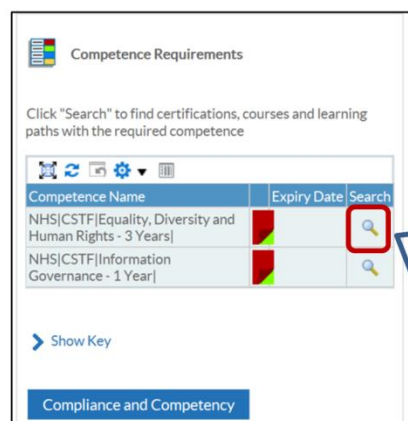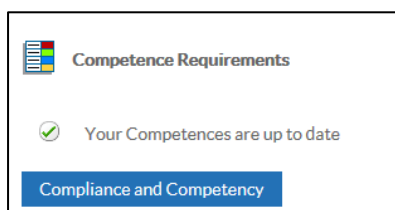6. "Learning" button to navigate to "My Learning Homepage".

! If you use the learning history by itself as proof of training for other organisations, this may not be enough to

show which subjects were covered (e.g. the contents of "Mandatory training update" has evolved through time).

We suggest using this in conjunction with a competence profile showing current competencies or all
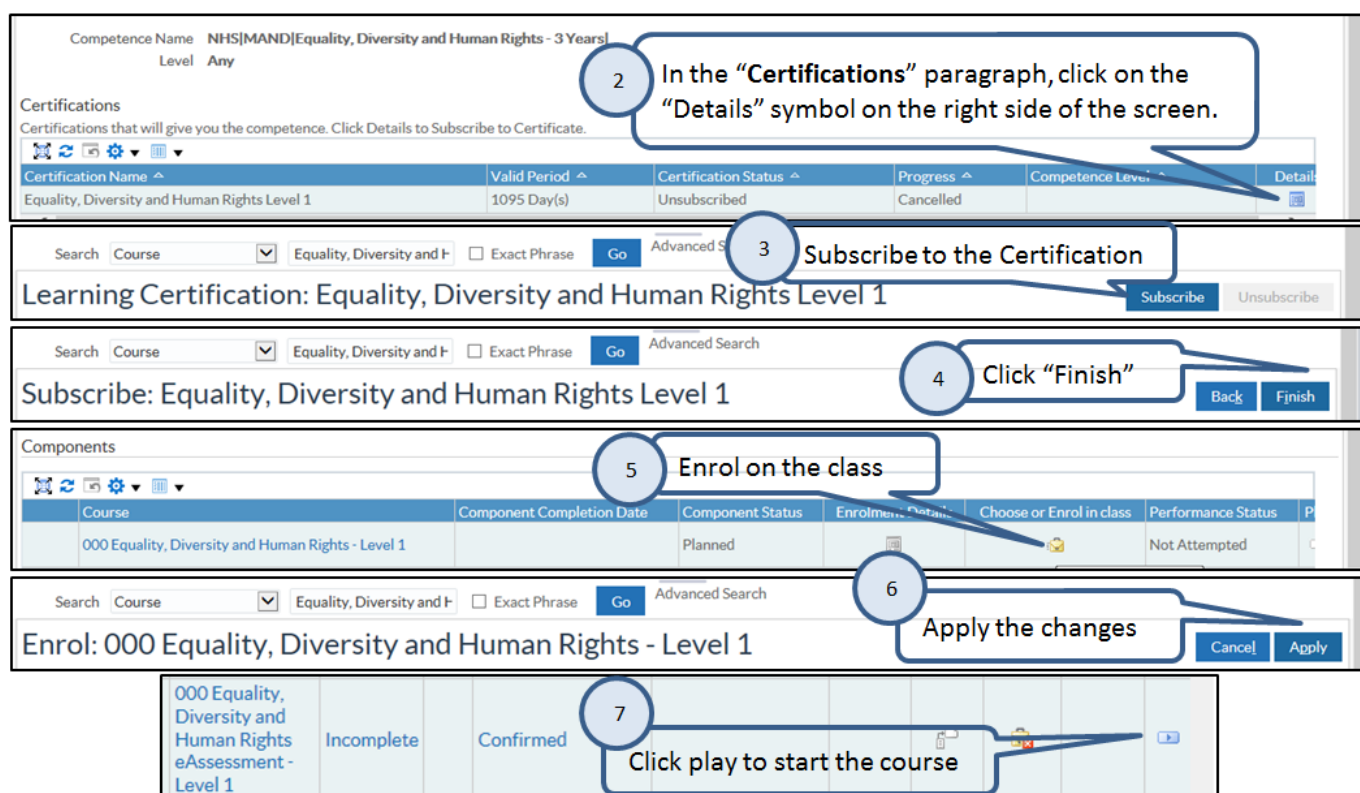
competencies). !

How do I enrol on a Mandatory E.Learning course?

This is accessible throught the "My Compliance and Competency". It is also accessible through the "My Learner Home Page", with the "Compliance and Competency" link:

Subjects with a red box are outstanding; Subjects with a yellow box will expire within 4 months. The full key is shown by expanding the "Show Key" heading.

To find the correct course, click on the looking glass next to the ESR Competence name.

1

2 — In the "**Certifications**" paragraph, click on the "Details" symbol on the right side of the screen.

3 — Subscribe to the Certification

4 — Click "Finish"

5 — Enrol on the class

6 — Apply the changes

7 — Click play to start the course

Please note: you must subscribe to the certification before enrolling on the course. If you do not do this, the learning will not carry through to your training record automatically. If a learning certification is not available, the course you have chosen is not attached to a mandatory training competence by SHSC, or this course is not available through E.Learning. Contact training@shsc.nhs.uk for support or to report issues.
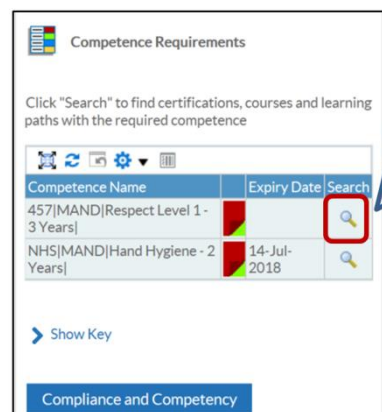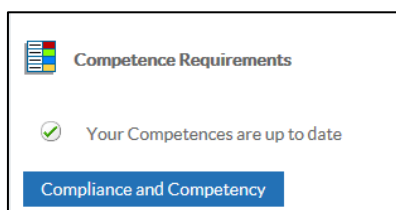More on Learning certifications here.

After completing an e-learning package always click the house symbol in the top right hand corner of your screen and then check it records as complete.

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How to enrol on a Face to Face course

This is accessible throught the "My Compliance and Competency". It is also accessible through the "My Learner Home Page", with the "Compliance and Competency" link:

Competence Requirements

✓ Your Competences are up to date

Compliance and Competency

Competence Requirements

Click "Search" to find certifications, courses and learning paths with the required competence

Competence Name		Expiry Date	Search
457|MAND|Respect Level 1 - 3 Years|			🔍
NHS|MAND|Hand Hygiene - 2 Years|		14-Jul-2018	🔍

> Show Key

Compliance and Competency

To find the correct course, click on the looking glass next to the ESR Competence name. **(1)**

Subjects with a red box are outstanding; Subjects with a yellow box will expire within 4 months. The full key is shown by expanding the "Show Key" heading.

(2) In the "**Courses**" paragraph, click on the "Offering Details" symbol on the right side of the screen.

Competence Name 457|MAND|Respect Level 1 - 3 Years|
Level Any

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

Certification Name	Valid Period	Certification Status	Progress	Competence Level	Details
No results found.					

Courses
Courses that will give you the competence. Click Details to see classes available for the offering.
The Class Details button will only be enabled where there is a single class available for enrolment.

Course Name	Offering Name	Delivery Mode	Enrolled on a Class	Competence Level	Offering Details
457 2017/18 Respect Level 1	457 2017/18 Respect Level 1	Classroom	No	1 - Attended	🔲

Offering: 457 2017/18 Respect Level 1
Use this page to view and enroll in a class. To cancel your enrollment, click the class name, then click U...

> Show Key Notation

Classes

(3) Enrol on your chosen date; make sure your manager is aware and the course date you are choosing is compatible and recorded on local rotas.

List of dates and times available

Filter by Name

Class Name	Info	Location	Training Center	Start Date	Start Time	Time Zone	Duration	Class Status	Enrol
457 2017/18 Respect Level 1 03 23	ⓘ	457 XK Fulwood House	457 Fulwood House (Training)	23-Mar-2018	09:15	GMT	1 Day(s)	Normal	Not Enrolled	
457 2017/18 Respect Level 1 03 26	ⓘ	457 XK Fulwood House	457 Fulwood House (Training)	26-Mar-2018	09:15	GMT	1 Day(s)	Normal	Not Enrolled	

Enroll: 457 2017/18 Respect Level 1 03 23

(4) Apply the changes

Cancel Apply

> Show Key Notation

The details of the classroom courses you are enrolled on will appear in the "Enrolments" tab on your "Learner Home Page"

Class Summary
Delivery Mode Classroom
Course Name 457 2017/18 Respect Level 1
Class Name 457 2017/18 Respect Level 1 03 23
Start Date 23-Mar-2018 09:15
End Date 23-Mar-2018 16:30
Time Zone GMT
Training Center 457 Fulwood House (Training)

Once you are enrolled on a face to face course, it becomes visible in the "enrolments" tab in the "My Learning" page. This also has an "add to Outlook" button to add the course to your electronic diary.

Please note: not all courses are open for auto enrolment on ESR, if there are not classes listed on the page but there are dates on the intranet, please email training@shsc.nhs.uk and we will book you on the course if there are places left.

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ESR Certifications

You can access your current certifications from your Learner Home Page; your historical certifications are available on your Learning History.

ESR Certifications link an E.Learning course with a competence in your training record.

If you do not use the certification:
- The competence will not be allocated to your training record.
- You will not be able to repeat the E.Learning course when the renewal date comes as the system will only save the first completion date.
- You can complete a course without a certification if it is not a training that SHSC measure compliance for. This will carry over to your learning history; if you complete it again at a later date, the first date you completed it will remain the "completion date". (this could be for example: "000 North: Taking Minutes"; "000 Using e-Learning in ESR / OLM", or one of the "IT Skills pathway" courses)

You need to be subscribed on a certification if you are completing a mandatory training course.

1. Name of the certification: we try to make this as close to the name of the corresponding E.Learning course and ESR Competency as possible.
2. *Progress*: this could be one of the following
   - ✓ Active (you can play the course); the certification renewal date is in the future. This does not mean you need to complete this course soon, look at the expiry date of the competence.
   - ✓ Inactive (you need to enrol on the course before playing)
   - ✓ Completed (you can move to history if it was a one off course or wait for the renewal date)
   - ✓ Expired (you need to renew the certification before playing the course)
3. *Certification Status*:
   - ✓ Subscribed: you can complete the course if you are enrolled. Being subscribed to a certification does not mean you need to complete this course soon, please look at the expiry date of the competence.
   - ✓ Unsubscribed: please do not unsubscribe, administrators will do this centrally.
   - ✓ Certified: you have completed and passed the course and the competence has been allocated to your training record.
   - ✓ Renewing: you can complete this course again as a repeated learning (every 1, 2 or 3 years)
   - ✓ Concluded: this has been end dates by an administrator.
   - ✓ Expired: you need to renew the certification to be able to play the course.
4. Renew date: this must be in the future to play a course.
5. Renew button: if this is not available and you need to play the course, Contact us.

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ESR Competencies

Competencies are lines in training records that represent a subject. A Competency can show if training requirements were completed at what dates and when they expire.

ESR competencies are used to measure training compliance at all levels, for individuals, teams, subjects, or the trust as a whole. A training competence can be gained through various methods, including face to face training, E.Learning, or training in the workplace where relevant.

There are two types of competencies:

- **Competency achievements** these are attached to a person's record and can be gained through face to face training or E.Learning through a certification.
- **Competency requirements** are linked to a position on ESR (e.g. similar to job role).

The ESR key for the competencies you will access on your Employee Self Service profile is as follows:

Green	Training compliant with three months or more left
Yellow	Training compliant with less than three months left
Red	Not compliant (may be expired or at a lower level or has never had the competence)
Blue	Has the competence but is not required
Green corner	Green corner shows the competence achievement is under way (booked on a face to face course or enrolled on an E.Learning that will achieve the competence.

You can see the history of all the competencies that have been allocated to your training record on your "competence profile" by clicking "All Competencies".

Competency Name	Competence Level	Start Date	End Date
NHS|MAND|Mental Capacity Act - 3 Years|		02-Aug-2017	01-Aug-2020
NHS|MAND|Data Security Awareness - Level 1|		25-Jul-2017	25-Jul-2018
NHS|MAND|Deprivation of Liberty Safeguards - 3 Years|		25-Jul-2017	24-Jul-2020
NHS|MAND|Autism Awareness - Level 1 - No Renewal|		16-Jun-2017	
NHS|MAND|First Aid - 3 Years|		09-May-2017	08-May-2020
457|LOCAL|MTU 1617|Core	1 - Attended	17-Mar-2017	31-Mar-2017
NHS|CSTF|Fire Safety - 2 Years|		17-Mar-2017	17-Mar-2019
NHS|CSTF|Fire Safety - 3 Years|		17-Mar-2017	16-Mar-2020
NHS|MAND|Infection Control - Level 1 - 2 Years|		17-Mar-2017	17-Mar-2019
NHS|MAND|Infection Control - Level 2 - 2 Years|		17-Mar-2017	09-May-2019

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ESR Notifications

> **[Secure] You Have Open ESR Notifications - Please log in to ESR to view. Do Not Reply to this mail.**
>
> esr.wfmPROD@nhs.net
>
> Sent: Mon 23/07/2018 04:32
>
> To:
>
> ✉ Message   📄 Encrypted_Message.htm (12 KB)
>
> PRIVATE AND CONFIDENTIAL
>
> You have received an email message secured by Private Post. Please open the file called Encrypted_Message.htm to read the message.
>
> -

You will receive notifications from ESR on your email address recorded on the system. As we do not use nhs.net email addresses, you need to log on to the system to read the content of the notification.

You can do this by clicking on the white page at the top right corner of the portal welcome page. 📄

For notifications about training expiries:

- Ignore the notifications about "Certification Subscriptions"

- Training expiry notifications will mention "Competency update/expiry date"

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Troubleshooting

Working on a non-SHSC device

If you are using a computer on the SHSC network, the settings below should be your default settings when using ESR.
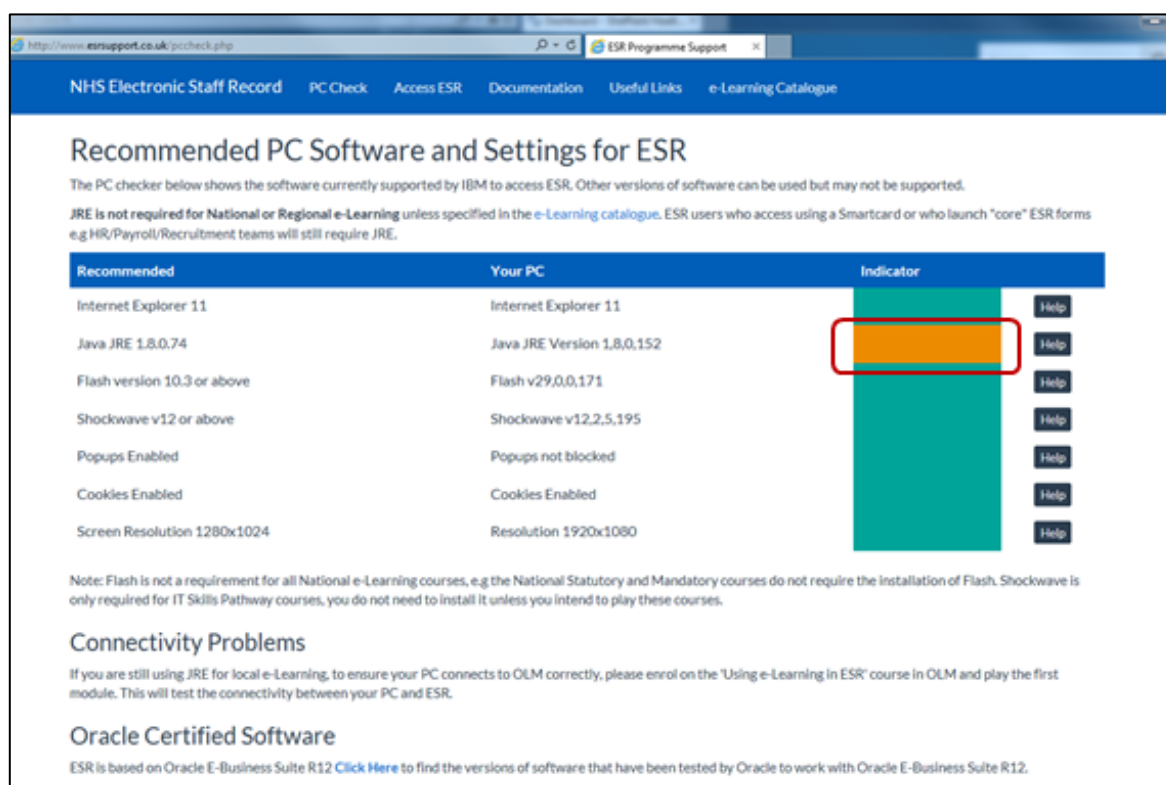
If you are using your own device or a device at another employer's, please follow the guidelines as below:
- Use Internet Explorer 11; Note: other browsers may appear to work but issues will need to be replicated in IE11 to be reported with our suppliers.
- Turn off pop up blockers (click on "Tools" (or Alt+X Keyboard shortcut); Select "Internet Options"; "Privacy" tab; un-tick the box next to "Turn on Pop-up Blocker". If you are using an SHSC computer, the box will be ticked, but the ESR website is an exception in the "Settings".
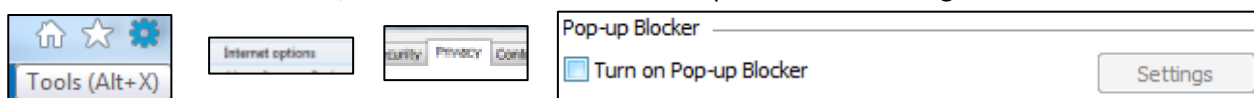
- To diagnose issues, and if you are reporting a problem, please send a screenshot of the PC Checker when you are having the issue. This checks if your PC has the components it needs to use ESR: Link to PC Checker: http://www.esrsupport.co.uk/pccheck.php

Example: Java is a slightly different version from the optimum to play some of the E.Learning content.

All the components may not have the same importance, e.g. some E.Learning will need Java which is not needed to use the rest of ESR in Employee self-service.

If your problems persist: Contact us, send us a screenshot of the full screen when you have an issue, if there is an error message, send us the exact text of the error. How to I take a screenshot?

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How do I take a screenshot?

A screenshot is a way to take a picture of the screen you are working on; you may want to take a screenshot either for your own records or to show someone else.

1. Navigate to the screen you want to take a screenshot of.
2. Press the "print screen" button on your keyboard. This may be abbreviated "PrtScn", depending on your keyboard, you may need to press Alt+PrintScreen or Windows+PrintScreen.
3. Open a Word document or an email
4. Paste (right click and paste or Ctrl+V keyboard shortcut) in the document or email.
5. You can them manipulate, change size or crop the picture.
6. If you are sending us a screenshot because there is an issue with ESR, please send the full screen, we will need to look at what browser you are using. If you are completing E.Learning, we need to know the time and date the system registered to narrow our searches. This is displayed in the bottom right of the screen if you send us full screen screenshots and is very useful to us.
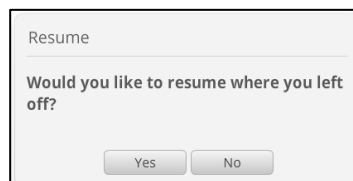
Has my E.Learning saved?

- To make sure your E.Learning course saves, click the house button when you exit the course.

  This saves where in the course you are leaving so you can pick up in the same place when you are ready to continue.

- If you think you have completed a course but the competence has not updated and the status still shows "Incomplete": Check you have completed all the modules in the course. Click to play the course again and select "pick up where you left off". Check that you have completed all the modules for the course, then clicked the house button in the top right corner of the screen.
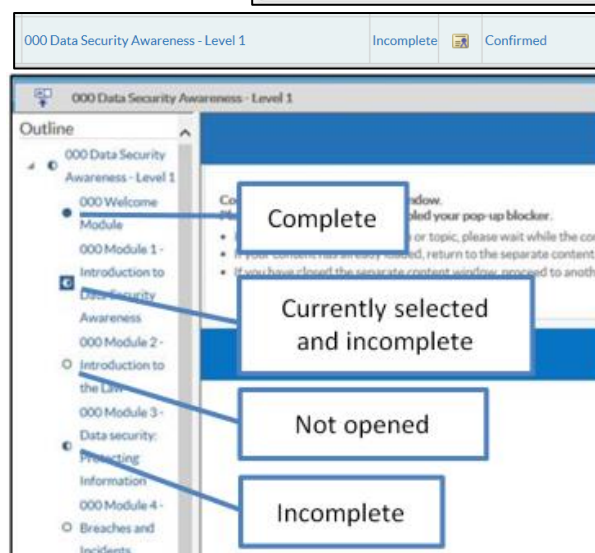
- If the status on the course is "Completed" but the competence has not updated, you may not have been subscribed to an up to date certification. Contact us if this happens with your full name or employee number and the name of the course.

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