

# **ESR Portal**

## **Employee Self Service**

### **User guide**

## Logging into ESR

### ESR Hub

1. On the ESR Hub Page click 'Login to ESR'



2. Enter the username and password you have been given.

The page has two main sections:

- Log in with your credentials**:  
Fields with an asterisk (\*) are required fields.  
Username\*:  (Example: 999JSMITH01)  
Password\*:
- Log in with your Smartcard**:  
Access ESR by inserting your Smartcard and entering your PIN, and then selecting the 'Log in via Smartcard' button.

[Forgotten | Request Username/Password | Unlock Account](#)

1. If you are logging in for the first time you will be asked to create your own secure password.  
Please refer to the password guide below for more information.

The screenshot shows the 'Update Password' page from the NHS Electronic Staff Record system. At the top left is the NHS logo and the text 'Electronic Staff Record' and 'NHS Electronic Staff Record'. The main title 'Update Password' is centered above a form area. The form contains three input fields: 'Current Password\*', 'New Password\*', and 'Confirm Password\*'. Below the fields is a note about the Computer Misuse Act. At the bottom are 'Cancel' and 'Submit' buttons. A red box highlights the 'Password Policy' link at the bottom left of the page.

NHS Electronic Staff Record  
NHS Electronic Staff Record

Update Password

Update Password

Fields marked with an asterisk (\*) are required fields.

Current Password\*

New Password\*  ?

Confirm Password\*

Cancel Submit

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](#)

## Change to ESR Password Rules

In August password rules change

In response to user feedback, managing your password will be simpler whilst retaining the recommended levels of security.

The next time you reset your password follow these 3 rules:

- Minimum of 12 characters
- Not one of your previous 4 ESR passwords
- Commonly used passwords, like "password1" are not allowed

OK

## Viewing your Payslip

- From the main screen select the “view payslips” option in the top right corner. You can also view your payslip by clicking on My Pay & Rewards on the left hand side and Selecting Payslip

- From the drop down options you can choose the year and the payslip you wish to open

- The system will now produce a PDF of your payslip

## ESR Update Personal Information

**IMPORTANT NOTE:** Some information will be applied instantly and will NOT be visible to your ESR Supervisor but, other details are legal information and will need to be approved by your manager.

**Instantly applied:**

- Employees address details
- Phone Numbers and Email Addresses
- Marital Status (please make sure that you inform the pensions dept.)
- Emergency Contact Information

**Manager approval required:**

- Name Change – this is a legal requirement and proof of this change must be made available to your line manager.
- Updating registration and Membership details – most of these interface from the relevant professional body but, if you do update these you will need to provide proof of your new registration details to your manager.
- Entering Qualifications – only qualifications relevant to your employment with the Trust should be entered and the relevant proof of passing must be provided to your manager.
- Entering a new work email address – It is recommended that you use a **nhs.uk** OR **nhs.net** email address for data security. Due to personal circumstances, like going on maternity leave, this may not always be practical for you to access ESR. You can therefore record any email address in this field. N.B. The Trust will use this email address to correspond with you regarding work related matters and if you choose to enter a none NHS email address in this field then you are accepting any risks associated with the Trust communicating with you by that method.

To view or update your Personal Information go to the My Personal Information Portlet – this is the best option if you want to update/check or correct your Name; Address; Marital Status; Phone Numbers and email addresses

The screenshot shows the NHS ESR dashboard. The left sidebar has a blue header with the NHS logo and 'Electronic Staff Record' text. Below it are links: 'My Role' (selected), 'My ESR', 'My Pages', 'Dashboard', 'Portal Content', 'ESR Navigator', 'My Personal Information' (selected), 'My Pay & Rewards', 'My Learning', 'My Compliance & Competency', 'My Absence', 'My Appraisals and Reviews', and 'My Employment'. The main content area has a banner with a tree and the text 'Welcome to Your ESR'. Below it is a 'My Compliance' section with a 'Assignments' dropdown set to 'All - Assignments' (Percentage Compliance: 88%) and a progress bar. At the bottom of the sidebar, there is a 'My Personal Information' link with a red arrow pointing to it.

You can also click on the My Personal Information link on the left menu to update Other Personal Information.

The screenshot shows the 'My Personal Information' sub-menu. It includes links for 'Personal Information', 'Religious Belief', 'Contacts', 'Disability Information', 'Qualifications', 'Registrations & Memberships', 'Sexual Orientation' (highlighted with a red arrow), and 'Conflict of Interest Declaration'.

Religious Belief and Sexual Orientation look the same and you can follow the steps below for both:

## How to Enter a Religious Belief

1. Click the **Religious Belief** link in the **My Personal Information** area. The existing information, taken from your application form, will be shown here.

NHS

Religious Belief: Extra Information

Employee Name \_\_\_\_\_

Employee Number \_\_\_\_\_

Click Update or Add to make changes to the sections below. Click Submit to continue this action, click Back to return to the previous page, or click Cancel to cancel this action.

Select Object:	Update
Status	Religious Belief
<input checked="" type="radio"/>	Christianity

Cancel | Back | Submit

2. Click the **Update** button and the following screen will be shown. Click on the magnifying glass to make changes or Cancel to back out.

NHS My Personal Information

Employee Name \_\_\_\_\_

Employee Number \_\_\_\_\_

Enter any changes below. Click Apply to continue this action, click Cancel to cancel this action and return to the previous page.

Religious Belief	
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Cancel | Apply

3. To change religious belief, click the **Search** icon next to the **Religious Belief** field.

Search and Select List of Values - Internet Explorer

Search and Select: Religious Belief

Cancel | Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Religious Belief  Go

Results

Quick Select	Religious Belief	Description
	No search conducted.	

4. To search for all values, enter % in the search field. Within ESR % is used as the wildcard search attribute which returns all available items. Please

note that it is preferable to enter some part of the search text as well as the wildcard character to limit the number of search results returned.

5. Click the **Go** button to start the search.

#### Search and Select: Religious Belief

##### Search

To find your item, select a filter item in the pulldown list and enter a value in the text field.

Search By **Religious Belief**  % **Go**

##### Results

Quick Select	Religious Belief
	Atheism
	Buddhism
	Christianity
	Hinduism

6. Click the **Quick Select** icon next to the appropriate religious belief.

7. Click the **Apply** button to save your changes.

Religious Belief: Extra Information

Employee Name  
Employee Number

Select Object: Religious Belief

Status: None

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Switch To Mobile

7. Click the **Submit** button.



Information

Your changes have been applied.

A confirmation message is displayed to indicate that the changes have been applied.

8. Click the **Portal** icon to return to the My ESR Dashboard.



## How to Enter Disability Information

- Click the **Disability Information** link in the **My Personal Information** area.  
Existing information will be included (Click on the Pencil to update) and you can check that and add new information

Effective Start Date	Effective End Date	Category	Status	Update
15-Mar-2020		Long-standing illness	Active	

- To add a new disability click on NEW

- Select the effective Date and the category from the drop down menu - use the % as shown above to see the list of options and select the radio button beside the correct one. Click on Apply to save.

## How to Enter/Change your Work Email address

- Click the **Personal Information** link in the **My Personal Information** area.  
The existing information, taken from your employment record, will be shown here.

**Personal Information**

Employee Name  
Employee Number

Basic Details

Full Name  
Marital Status  
Date of Birth  
NI Number  
Employee Number  
Work Email Address

**TIP** To view further basic details including e-mail address, gender and nationality, click the 'View and Update' button.

Phone Numbers & Personal E-Mail

**View and Update**

2. Click on View and Update Button
3. If the information that you are changing is a correction to an error then select Correct and click on NEXT but, if it is new/changed information then simply click on NEXT

Basic Details: Choose Option

Employee Name  
Employee Number

Select the type of change you want to make.

Correct or complete the current details.  
 Enter new information because of a real change to the current details (e.g. because of a change in marital status)

Cancel Next

4. Scroll down to the Work Email field and enter the email address that you wish to use for work purposes. It is recommended that you use a **nhs.uk** OR **nhs.net** email address for data security. Due to personal circumstances, like going on maternity leave, this may not always be practical for you to access ESR. You can therefore record any email address in this field. N.B. The Trust will use this email address to correspond with you regarding work related matters and if you choose to enter a none NHS email address in this field then you are accepting any risks associated with the Trust communicating with you by that method.

Work Email Address

5. Click on the NEXT button
6. Check that the information you have entered is current by checking fields highlighted with the Blue Circle

Personal Information: Review

Employee Name  
Employee Number

Review your changes and, if needed, attach supporting documents.

Indicates Changed Items.

Cancel Printable Page Back Submit

7. Once you are happy that information is correct click on the SUBMIT button
8. You will see that the change has been submitted to your manager for approval



## ✓ Confirmation

Your changes have been submitted for approval.

If you need help navigating around ESR there are several guides available. For assistance please contact the ESR Helpdesk ESR.Helpdesk@sthk.nhs.uk.

### How to Update Phone Number and email address

1. To update your phone number, email address or home address select to personal information tab. Click on the add button next to the relevant field you wish to add/amend.

Personal Information

Employee Name  
Employee Number

Back

Basic Details

Full Name  
Marital Status  
Date of Birth  
NI Number  
Employee Number  
Work Email Address

**View and Update**

TIP To view further basic details including e-mail address, gender and nationality, click the 'View and Update' button.

Phone Numbers & Personal E-Mail

Add

Addresses

Add

Add

Back

2. Make the changes using the options and click next.

#### Phone Numbers: Enter and Maintain

**Cancel** **Next**

Employee N.  
Employee Num...

Type	Number	Delete
Home		
Mobile		
Personal E-Mail		

### 3. Confirm changes by clicking submit.

#### Personal Information: Review

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Employee Name

Employee Number

Review your changes and, if needed, attach supporting documents.

 [Indicates Changed Items.](#)

#### Phone Numbers

	Current	Proposed
Home		
Mobile		
Personal E-Mail		

#### Additional Information

##### Attachments

To help approvers understand the request, you can attach supporting documents, images, or links to this action.



[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)