



# ESR Annual Statement



It's your ESR

## Discover Your ESR Action Plan Statement

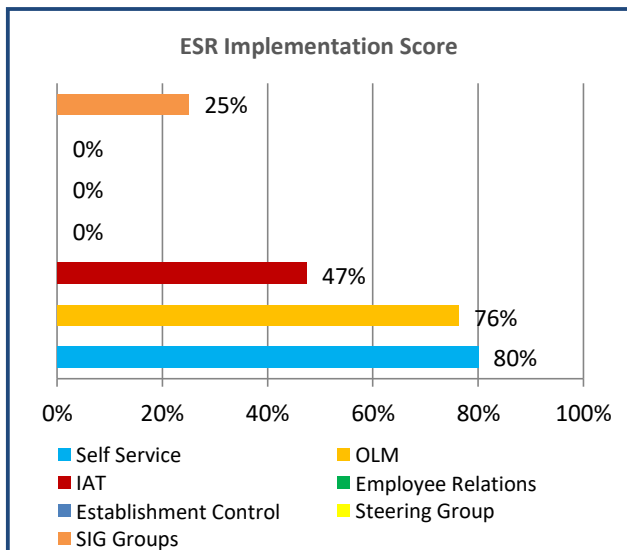
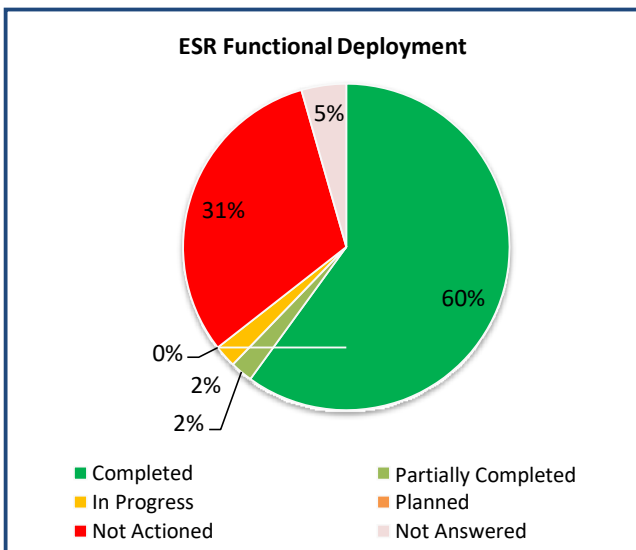
Organisation Name:  
ESR Account Manager:  
ESR Functional Advisor: **David Bromilow**  
Report Date:

As the workforce solution for the NHS, ESR supports the delivery of national workforce policy and strategy. It provides NHS organisations with a range of tools that facilitate effective workforce management and planning; thereby enabling improved quality, improved efficiency and improved patient safety. The comprehensive suite of workforce management functionality within ESR is exclusive to managers and employees within the NHS in England and Wales.

The following report provides a detailed summary of the ESR utilisation made by the organisation. The figures and calculations are based on information taken from ESR for your organisation, or what has been entered when completing the ESR Assessment Tool. It is intended to provide an overview of functionality implemented and how productively it is used. It is appreciated centrally that not all functionality will be used by all organisations, but we want to support organisations to operate as effectively and efficiently as possible.

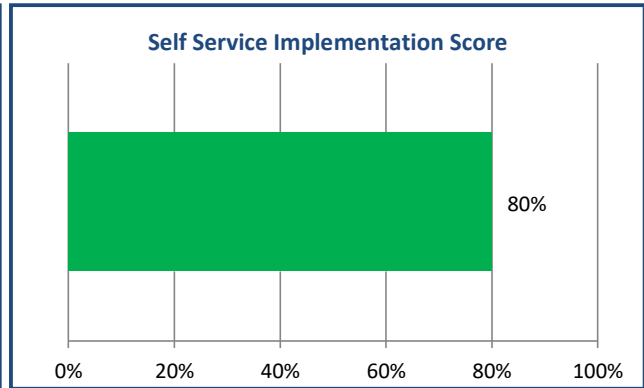
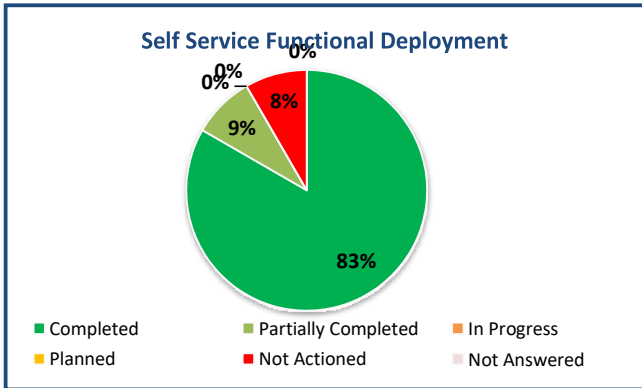
For support with the implementation of any functional area or maximising how it is used, please contact your NHS ESR Account Manager and/or Functional Advisor. The target dates below give you a guide in which to plan, and are designed to provide an indication to the NHS ESR Programme Team where and when support is required.

## Functional Deployment Status





## Self Service



### Self Service Usage

		Target Date
Employee Self Service Limited Access	Completed	_____
Employee Self Service	Completed	_____
Supervisor Self Service Limited Access	Not Actioned	_____
Supervisor Self Service	Completed	_____
Manager Self Service Payroll Approvals Required	Not Actioned	_____
Manager Self Service Payroll Approvals Not Required	Completed	_____
Administrator Self Service	Completed	_____

Notes - From Self Service Section

### Auto User Creation Process Setting:

Users Automatically get SS Account	Completed
Auto Approval for Internet Access	Completed

Notes



**Change Forms - Personal Information**

		Target Date
Address Changes	Completed	_____
Contacts Information	Completed	_____
Equality & Diverstiy	Completed	_____
Bank Account Details	Completed	_____

**Change Forms - Assignment Information**

		Target Date
Position & Grade	Not Actioned	Sep-18
Hours & Location	Completed	_____
Supervisor Details	Completed	_____
Starters	Completed	_____
Terminations	Not Actioned	Sep-18

Notes - From Changes Forms Section

**Online Payslips**

		Target Date
Online Payslips Only	Completed	_____

Notes - From Payslip Section

**Absence Recording**

		Target Date
Sickness Absence	Completed	_____
Annual Leave	Completed	_____

Notes - From Absence Section

Bank Staff Annual Leave is recorded outside of ESR and should not be reflected in this report. The same is for medical workforce.

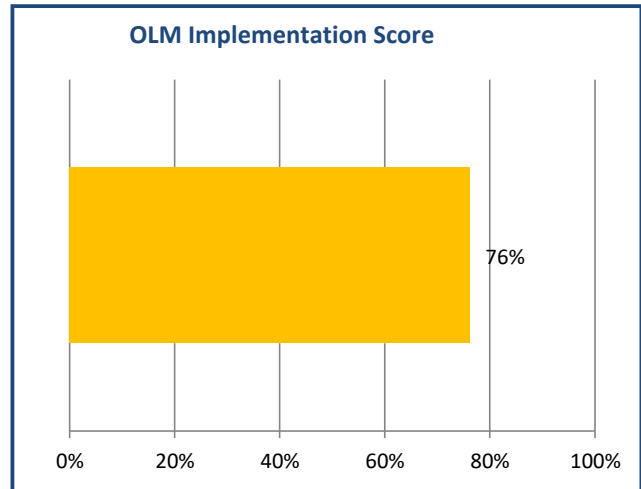
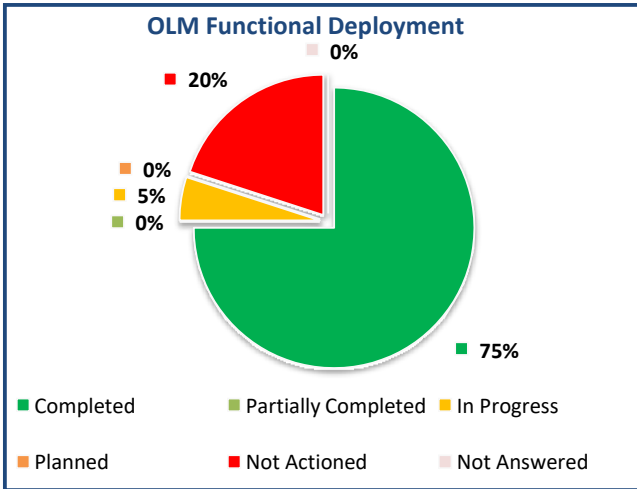
**Appraisal Recording**

		Target Date
Performance Appraisals	Completed	_____
Nurse Revalidation	Not Actioned	_____

Notes - From Appraisal Section



## Learning & Development



### Physical Learning

		Target Date
OLM used for recording Physical Learning	Completed	_____
Enrolments occur prior to Class Start Date	Completed	_____
Self Enrolment enabled where appropriate	In Progress	_____
Class Update Portlet used to update attendance	Not Actioned	____Sep-18____ Not
Waitlisting functionality activated	Not Actioned	<u>working as required</u>

Notes - From Physical Learning

about 85% of training is delivered through OLM, for Shared Services is unknown.

### e-Learning

		Target Date
OLM used for recording e-Learning	Completed	_____
Self Enrolment enabled where appropriate	Completed	_____
Certifications used for renewable learning	Completed	_____
Auto Enrolment enabled where possible	Completed	_____
Remote Access encouragedoted ESR	Completed	_____
APP promoted	Completed	_____

Notes - From e-Learning



**Compliance**

Target Date

**Where is Compliance Reported**

ESR BI

**Competences in OLM Catalogue**

Completed

**Competency Requirements set in Workstructures**

Completed

**Process for Requirements for new Positions**

Not Actioned

Sep-18

**Compliance Reporting to Users**

ESR Portal

**Compliance Reporting to Managers**

ESR Portal

**L&D produce own Compliance Reports**

Completed

Notes - From Competences

**Compliance Reporting**

Target Date

**Aware of Compliance and Compliance Trending Dashboard**

Completed

**Use Timeline Dashboard for setting future classes**

Not Actioned

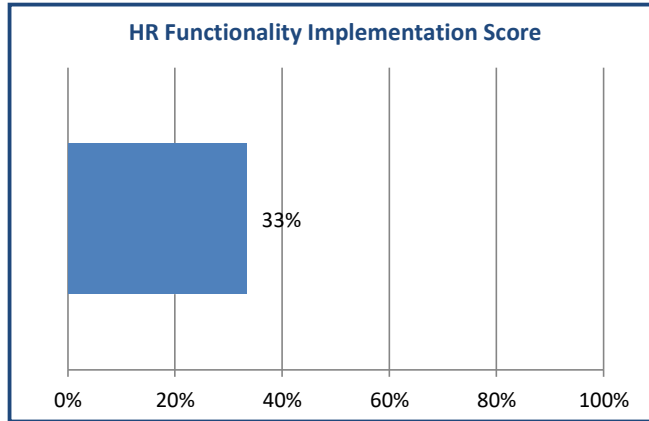
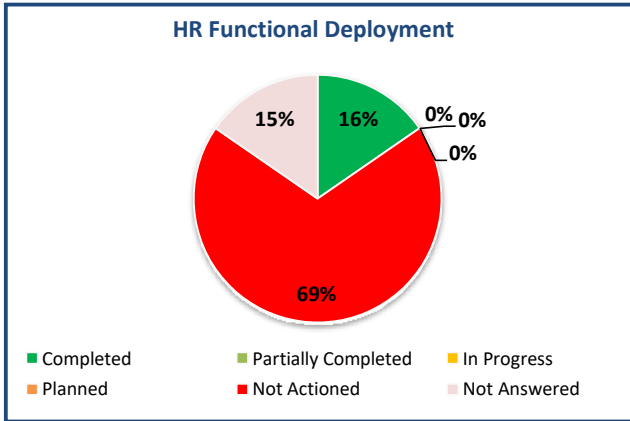
**Use Compliance Trending for future compliance rates**

Completed

Notes - From Compliance Reporting



HR Functions



Recruitment Process

Does Medical Recruitment operate separately to General Recruitment **Yes**

Is the Medical Staffing Recruitment process different to General Recruitme **Yes**

General Recruitment

		Target Date
e-Recruitment Interface used	Completed	_____
Opted in to Auto IAT	Completed	_____
Pre Hire IAT run	Completed	_____
Factual Reference requested	Not Actioned	_____
Post Hire IAT completed	Not Actioned	_____
Portable Data Set Copy completed	Completed	_____
Unsuccessful Applicant records closed	Not Actioned	_____

Notes - From General Recruitment

Medical Recruitment

	Yes	Target Date
e-Recruitment Interface used	Not Actioned	_____
Opted in to Auto IAT	Completed	_____
Pre Hire IAT run	Not Actioned	_____
Factual Reference requested	Not Actioned	_____



<b>Post Hire IAT completed</b>	<b>Completed</b>	_____
<b>Portable Data Set Copy completed</b>	<b>Completed</b>	_____
<b>Old Applicant records closed</b>	<b>Not Actioned</b>	_____

Notes - From Medical Recruitment

**IAT Roles & Responsibilities**

<u>Roles Allocated</u>		Target Date	<u>Roles Actively Used</u>		Target Date
<b>IAT Initiation</b>	<b>Completed</b>	_____	<b>IAT Initiation</b>	<b>Completed</b>	_____
<b>IAT Approver</b>	<b>Not Actioned</b>	_____	<b>IAT Approver</b>	<b>Not Answered</b>	_____
<b>Stat &amp; Mand</b>	<b>Completed</b>	_____	<b>Stat &amp; Mand</b>	<b>Completed</b>	_____
<b>Occupational Health</b>	<b>Not Actioned</b>	_____	<b>Occupational Health</b>	<b>Not Answered</b>	_____
<b>Reference Approver</b>	<b>Not Actioned</b>	_____	<b>Reference Approver</b>	<b>Not Answered</b>	_____
<b>Reference Receiver</b>	<b>Not Actioned</b>	_____	<b>Reference Receiver</b>	<b>Not Answered</b>	_____

Notes

Intreoid for medics is used

**Responding to Reference Requests**

		Target Date
<b>Approve incoming Reference Requests</b>	<b>Not Actioned</b>	_____
<b>Aware of ESR BI Factual Reference</b>	<b>Completed</b>	_____
<b>Use ESR BI Factual Reference</b>	<b>Not Actioned</b>	_____
<b>Who responds to reference requests</b>	<b>Mixture</b>	

Notes



**Employee Relations**

Target Date

Employee Relations cases recorded centrally

Yes

\_\_\_\_\_

ESR Used to record Employee Relations cases

**Not Actioned**

\_\_\_\_\_

Where is WRES Reporting completed

**Not Answered**

Aware of ESR BI supporting ER Dashboards

**Completed**

Notes

**Establishment Control**

Target Date

Is Establishment Control setup within ESR

**Not Actioned**

How often is the Establishment updated

**Not Answered**

Aware of the ESR BI supporting Dashboards

**Completed**

Team responsible for keeping Establishment updated

**Not Answered**

Notes

**ESR Steering Group**

ESR Steering Group set up

**Not Actioned**

Notes

**SIG Attendance Group**

	Contact Provided	Attendance
HR SIG	<b>No Contact</b>	<b>Not Attended</b>
Self Service SIG	Contact Provided	<b>Attended</b>
OLM SIG	<b>No Contact</b>	<b>Not Attended</b>
Payroll SIG	<b>No Contact</b>	<b>Not Attended</b>

Notes