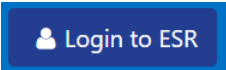


Accessing Mandatory Training and Compliance on ESR

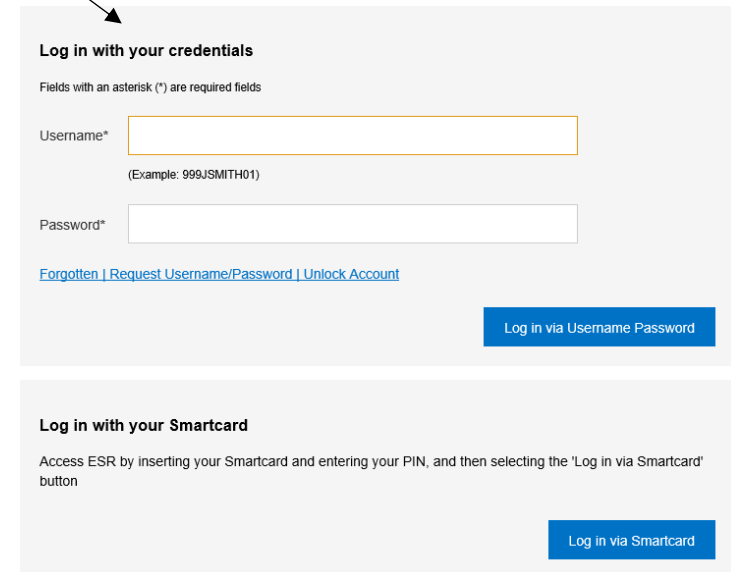


Logging on to ESR

1. Click on this link to access ESR - <https://my.esr.nhs.uk/dashboard/web/esrweb>
(Internet explorer is the recommended browser if completing mandatory training, training might not register/complete if you use another browser)

2. Log in to ESR → 

3. Log in with username and password or with smart card and pin



The screenshot shows the ESR login interface. It is divided into two main sections. The top section is titled "Log in with your credentials" and includes a note: "Fields with an asterisk (*) are required fields". It contains two input fields: "Username*" and "Password*", with an example "(Example: 999JSMITH01)" provided below the username field. Below the password field are three links: "Forgotten", "Request Username/Password", and "Unlock Account". A blue button labeled "Log in via Username Password" is positioned at the bottom right of this section. The bottom section is titled "Log in with your Smartcard" and contains the instruction: "Access ESR by inserting your Smartcard and entering your PIN, and then selecting the 'Log in via Smartcard' button". A blue button labeled "Log in via Smartcard" is located at the bottom right of this section. An arrow from the text "Log in with username and password or with smart card and pin" points to the top of the login form.

4. On the front page if you scroll down you will see the Compliance Portlet

The screenshot displays the NHS Electronic Staff Record (ESR) front page. The top navigation bar includes the NHS logo, 'Electronic Staff Record NHS Manchester CCG', a search bar, and user information for James Fielding. The main content area is divided into several portlets:

- My Pages:** A vertical sidebar on the left with links to 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.
- Learning Portlet:** Shows '000 Resuscitation Level 1' with a 'Play' button and a status of 'Incomplete'. Below it is a 'Learner Homepage' button.
- Assignment Portlet:** Displays '30292358 - OD & L Business Partner' with an 'Accrual Plan' of 'Annual Leave Hours 1 NHS'. It shows 'Entitlement: 26.5 Hours', 'Taken: 9.5 Hours', 'Booked: 17 Hours', and 'Remaining: 0 Hours'. Buttons include 'Create Annual Leave' and 'View My Absence Calendar'.
- My Compliance Portlet:** Shows 'All - Assignments' with a 'Percentage Compliance: 93%' and a progress bar. It contains a table of competencies:

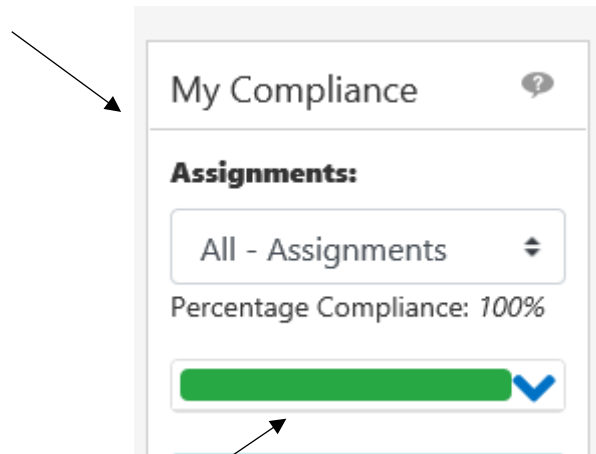
Competency Name	Status
<input type="radio"/> Resuscitation - Level 1 - No Specified Renewal	i
<input type="radio"/> Infection Prevention and Control - Level 1 - 3 Years	i
<input type="radio"/> NHS Conflict Resolution (England) - 3 Years	i

Buttons for 'Play', 'Search', and 'View' are located at the bottom of this portlet.

- My Personal Information Portlet:** Shows 'Name: James Fielding' and a prompt to expand to view details.
- My Equality and Diversity Portlet:** Shows a 'View Details' button and a prompt to expand to view details.
- Bank Details Portlet:** Shows 'View Details' and a prompt to expand to view bank account details.
- My Total Reward Statements Portlet:** Shows 'Tax year: 2020 - 2021', the NHS logo, 'Total Reward Statements', and a 'View My TRS' button.
- My ESR Calendar Portlet:** Shows 'Friday March 11, 2022' and an 'Information' box stating 'You have no upcoming events in the next 7 days.' with a 'View My Calendar' button.

Viewing Compliance Portlet & Outstanding Mandatory Training Modules

5. On the compliance portlet you can see your compliance and access any required eLearning modules



6. The Percentage Compliance Indicator shows your compliance and updates as you complete your assignments (eLearning modules).

If you are not fully compliant you will see this indicated in red.



7. Click the dropdown arrow next to the Percentage Indicator to view any outstanding training.

Next to the modules are information icons providing further details on the module when you hover the cursor over it.



My Compliance

Assignments:
20000318 | Staff Nurse

Percentage Compliance: 75%

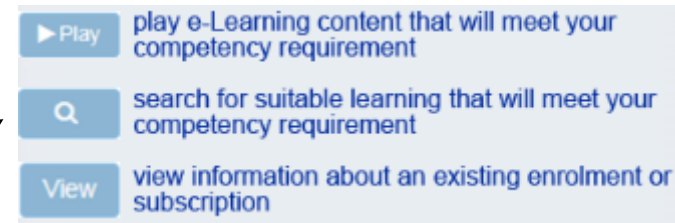
Competency Name	Status
<input type="radio"/> Resuscitation - Level 1...	
<input type="radio"/> NHS Conflict Resoluti...	
<input type="radio"/> Resuscitation - Level 2...	

▶ Play 🔍 View

The competency NHS[CSTF]Resuscitation - Level 1 - 1 Year needs attaining. As you are yet to attain this competency, please take appropriate action to rectify this.

Opening and Completing Mandatory Training Modules

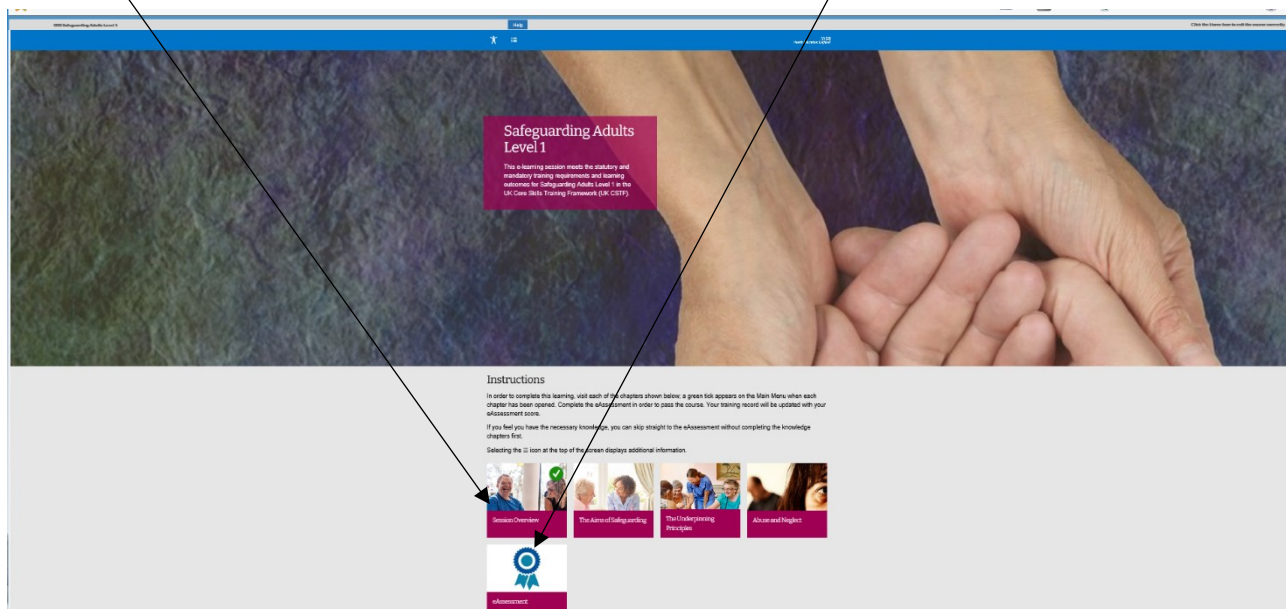
8. To access a module select the radio button next to the relevant module



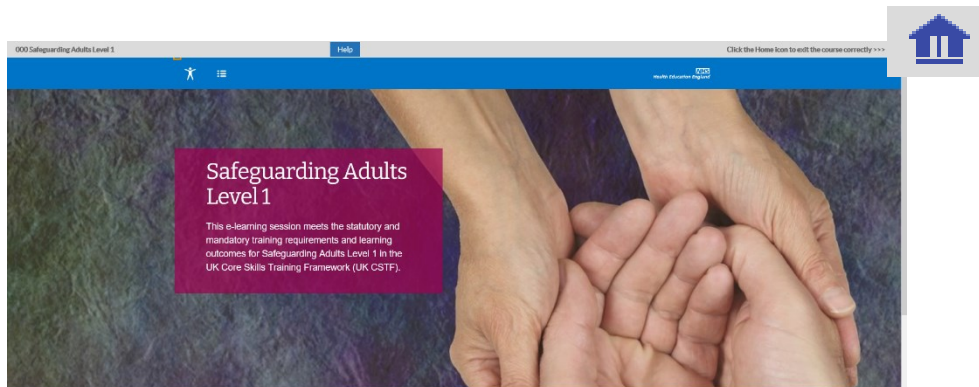
You will be able to select one of 3 options.

9. When you have selected the relevant module in the radio button click play and the eLearning module will appear in a new tab on your browser.

10. **Read** Instructions before you start and complete the assessment to complete the course



11. Click the Home icon to exit the course correctly or your training may not complete or record properly.



Viewing All Compliance Details

From the front page click on the dropdown on the Compliance Portlet













This will reveal the View my compliance option at the bottom of the portlet

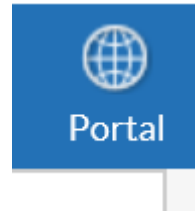


To view compliance in more detail, click on View My Compliance








This will display your compliance and competency on the following screen in the below format.

Export	Printable Page							
Details	Competency Name ^	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning	Edit
>	NHS CSTF Equality, Diversity and Human Rights - 3 Years	1 - Assessed	1 - Assessed	N	31-Oct-2020	 		
>	NHS CSTF Fire Safety - 2 Years	1 - Assessed	1 - Assessed	N	30-Oct-2019	 		
>	NHS CSTF Infection Prevention and Control - Level 2 - 1 Year	1 - Assessed	1 - Assessed	N	31-Oct-2019	 		
>	NHS CSTF Information Governance - 1 Year	1 - Assessed	1 - Assessed	N	30-Aug-2017	 		
>	NHS CSTF Moving and Handling - Level 1 - 3 Years	1 - Assessed	1 - Assessed	N	30-Aug-2019	 		

If you need to get back to the previous screen you can click back to the portal by clicking on the portal icon in the top right corner of the browser.



The Show Key dropdown displays compliance status symbols

-  Compliant with three months or more left
-  Compliant with less than three months left
-  Compliant, less than three months left, under way
-  Not Compliant (may be expired or at a lower level or has never had the competence, check expiry date and level attained to see which)
-  Not Compliant, under way
-  Has the competence but it is not required
-  Does not have the competence and it is not required

'No Expiry' in the expiry date field means the Employee has the competence without an end date i.e. Competence is required once only

Access specific training modules by direct link

Employees	
Training	Training Descriptor
How do I enrol on training	Complete outstanding/upcoming mandatory training and enrol on learning events
How do I manage my compliance and competences	View your compliance status and see if you have any outstanding or upcoming training
How do I manage my notifications	View and action your Notifications
View my learning record using the Learner Homepage	Navigate the learner homepage, renew your learning, manage your Enrolments & Subscriptions
How do I Record my external training	Record any training you have completed externally
How do I reset my password	If you have forgotten your password or locked your account, you will need to reset your password

Manager

Training	Training Descriptor
How do I manage my team's compliance and competency Records	View the overall compliance status of your team and individuals within your team.
How do I view and action my e-mail notifications	As a manager approve, reject or request more information directly from the notification without logging into ESR
How do I View and action notifications	A notification is a system delivered message that is for information and may require an action to be completed
How do I view the complete learning record for each of my staff in ESR using the Learner Homepage	Navigate the Learner Homepage and view an employee's full learning record, including any external learning entered onto ESR, and their mandatory training compliance status. This includes your direct reports and any sub teams in your hierarchy in ESR
How do I enrol an employee on training	Enrol employee on a learning event
How do I record external learning for an employee	As a manager record details of an employee's attendance on external training courses