

# HR20 – ESR Access Record Card

All information will be logged and audited within the organisation. This form should be fully completed. Incomplete forms cannot be processed and will be returned to the requester. The requester must be a registered authorised signatory. This form must be received from the registered email address in order to be processed.

\* Mandatory Field

1. About the User			
Organisation *	Please Select		If Organisation selected as Payroll Provider – provide name:
Assignment Number *	It is essential that this number is provided. It can be found on either the employees wage slip or the monthly budget report		
Surname *		Forename(s) *	
Title *	Select...	Job Title *	
NI Number *		Date of Birth *	
Email Address *			
I am completing this form because... *			
I am a NEW ESR user	<input type="checkbox"/>	I need to CHANGE my ESR access	<input type="checkbox"/>
I am LEAVING the CSU/CCG	<input type="checkbox"/> and my ESR Access ends effective		
I am CHANGING ROLE and no longer require access	<input type="checkbox"/> and my ESR Access ends effective		
I have a SMART CARD	<input type="checkbox"/> (if not please contact SMART CARD SERVICES)		
UUID number * (on front of Smart Card)			
2. ESR Access *			
A set of profiles have been created to support in granting access to the system. The meaning of each profile below is included at the end of this form. Please tick the profile that is most appropriate to you.			
Audit	<input type="checkbox"/>	Finance	<input type="checkbox"/>
HR – Medical Staffing	<input type="checkbox"/>	HR – Employee Relations	<input type="checkbox"/>
HR – Reporting	<input type="checkbox"/>	HR – Super	<input type="checkbox"/>
WD – Appraisals	<input type="checkbox"/>	Payroll Provider – Payroll & Pensions	<input type="checkbox"/>
		HR – View Only	<input type="checkbox"/>
		HR – Administrator	<input type="checkbox"/>
		Workforce Development	<input type="checkbox"/>
		Payroll Provider – Payroll Super	<input type="checkbox"/>
If you require additional responsibilities that are not part of the profiles above then please tick the boxes next to the responsibility(ies):			
Absence Administration	<input type="checkbox"/>	Absence Data Entry	<input type="checkbox"/>
Career Management	<input type="checkbox"/>	Disco Ad Hoc	<input type="checkbox"/>
Element Entry – All Elements	<input type="checkbox"/>	Element Entry – Expenses	<input type="checkbox"/>
Element Entry – Timesheets	<input type="checkbox"/>	Employee Relations Administration	<input type="checkbox"/>
Employee Self Service	<input type="checkbox"/>	Finance Reporting	<input type="checkbox"/>
Finance Reporting and Hub Mapping	<input type="checkbox"/>	HR Administration	<input type="checkbox"/>
HR Administration with RA	<input type="checkbox"/>	HR Management	<input type="checkbox"/>
Inter Authority Transfer Approval	<input type="checkbox"/>	Inter Authority Transfer Initiation	<input type="checkbox"/>
Learning Administration	<input type="checkbox"/>	Learning User	<input type="checkbox"/>

Local HRMS System Administration	<input type="checkbox"/>	Local HRMS Systems and User Administration	<input type="checkbox"/>
Local HRMS User Administration	<input type="checkbox"/>	Local Reports	<input type="checkbox"/>
Local Workstructures Administration	<input type="checkbox"/>	Occupational Health Administrator	<input type="checkbox"/>
Payroll Administration	<input type="checkbox"/>	Payroll Audit	<input type="checkbox"/>
Payroll Data Entry	<input type="checkbox"/>	Payroll Super Administration	<input type="checkbox"/>
Pensions Administration	<input type="checkbox"/>	RA Workbench	<input type="checkbox"/>
Recruitment and Applicant Enrolment Administration	<input type="checkbox"/>	Vehicle Administration	<input type="checkbox"/>
Vehicle Administration and Expenses	<input type="checkbox"/>	Vehicle Administration and Payroll Data Entry	<input type="checkbox"/>
E-Learning User	<input type="checkbox"/>	Employee Self Service (Limited Access)	<input type="checkbox"/>

### 3. Employee Declaration

*I am aware of the need to follow the CCG policies and procedures concerning the use of IT systems, Data Security and Information Governance. Certain breaches in security will result in disciplinary action being taken. I understand that my access to ESR should not be shared.*

Please tick to confirm that you agree with the above statement \*

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### 4. Manager Authorisation (must be an authorised signatory for the cost centre given)

Cost Centre *	This is a 6 character code identifying the budget to which costs for this employee are charged.		
Cost Centre Name *		Job Title *	
Manager Name *		Telephone *	
Email Address *			

*I can confirm that the employee in section 1 requires access to ESR as defined in section 2 and has verified that they agree with the statement in section 3.*

Please tick to confirm that you agree with the above statement \*

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This form can now be emailed to [wbi.queries@nhs.net](mailto:wbi.queries@nhs.net) from the managers authorised email address.

Once emailed, please print a copy of this form. Both the employee and manager should sign the copy and the copy should be retained on the employees personal file

### 5. Signatures

Employee Signature *		Date *	
Managers Signature *		Date *	

**Do Not Print This Section**

## Guidance for form HR20 – ESR Access Record Card

This form should be used to perform one of the following tasks:

- Setup a new employee or existing employee with access to ESR
- Alter an existing ESR users access

- End access to ESR

### **For New and Existing Users**

- Complete sections 1, 2, 3 and 4 first and then print the form.
- The manager should then email the electronic copy to [wbi.queries@nhs.net](mailto:wbi.queries@nhs.net) from their authorised email address – see below.
- On the hard copy, complete section 5.
- The signed copy should be placed on the employee's personal file.

### **For leavers**

- Complete sections 1 and 4 and then print the form
- The manager should then email the electronic copy to [wbi.queries@nhs.net](mailto:wbi.queries@nhs.net) from their authorised email address – see below.
- On the hard copy, complete section 5.
- The signed copy should be placed on the employee's personal file.

### **Further Guidance**

**Authorised Email Address** – is the email address that you will be using to send information to Workforce Information. It should end in @nhs.net. We cannot accept email from any other email addresses. The email address must be registered with Workforce Information. If not, then we will need a HR25 – Authorised Signatory Card completed before we are able to receive emails from the manager.

### **Profiles**

Access Profile	URP Access	Example Staff Groups
<b>Audit</b>	Disco Ad Hoc Payroll Audit HR Management	Auditors
<b>Finance</b>	Finance Reporting and Hub Mapping	Finance Department
<b>HR – View Only</b>	HR Management	HR staff who do not input onto ESR
<b>HR – Medical Staffing</b>	HR Administration Recruitment & Applicant Enrolment Data Entry IAT Initiation IAT Approval ROLE – IAT Approver ROLE – IAT Initiator ROLE – Medical Staffing Officer ROLE – Occupational Health Administrator	For Medical Staffing who are required to input onto ESR for Drs
<b>HR – Employee Relations</b>	HR Management Employee Relations Administration	HR staff who are required to input employee relations data
<b>HR – Administrator</b>	HR Administration IAT Approval IAT Initiation Recruitment & Applicant Administration Local HRMS User Administration Local Workstructures Administration ROLE – IAT Approver ROLE – IAT Initiator ROLE – Occupational Health Administrator	Workforce Information and Recruitment Team members

<b>HR – Reporting</b>	Disco Ad Hoc ROLE – Discoverer Public User	For members of HR required to produce reports
<b>HR – Super</b>	HR Administration IAT Approval IAT Initiation Recruitment & Applicant Administration Local HRMS User Administration Local Workstructures Administration Disco Ad Hoc Local HRMS Systems and User Administration Learning Administration Career Management Finance Reporting and Hub Mapping Employee Relations Administration Payroll Audit ROLE – Discoverer Public User ROLE – Employment Check List All ROLE – Expiry Notifications ROLE – Gateway Increment Notifications ROLE – HR Maternity Ntf ROLE – IAT Approver ROLE – IAT Initiator ROLE – New Starter Notifications ROLE – Occupational Health Administrator ROLE – Termination Notification	Workforce Information Manager and Deputy
<b>Workforce Development</b>	Learning Administration Career Management HR Management	For Workforce Development
<b>Workforce Development – Appraisals</b>	Learning Administration Career Management HR Administration	For Workforce Development who also need to administer appraisal data
<b>Payroll and Pensions</b>	Payroll Administration Vehicle Administration Absence Administration	Payroll Provider Only
<b>Payroll Super</b>	Payroll Super Administration Vehicle Administration Disco Ad Hoc Local HRMS Systems and User Administration	Payroll Provider Only