
HR Web Portal: v1.4 Upgrade User Guide

THE V1.4 UPGRADE TO THE HR WEB PORTAL CONTAINS A NUMBER OF UPDATES, INFORMATION ON THIS UPDATED FUNCTIONALITY AND HOW TO USE IT IS LISTED WITHIN THIS USER GUIDE.

IN THE EVENT YOU ARE UNABLE TO RESOLVE YOUR ISSUE USING THIS USER GUIDE, **YOU MUST ALWAYS CONTACT YOUR LOCALITY HR TEAM** IN THE FIRST INSTANCE. PLEASE SEE CONTACT DETAILS FOR EACH OF THE TEAMS BELOW:

TEMPORARY STAFFING (BANK)

EMAIL: temporarystaffingrecruitment@nelft.nhs.uk

INTERNAL: 51530

PHONE: 0300 300 1530, PRESS 1

ACUTE REHABILITATION

EMAIL: ardhr@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 2, PRESS 1

BARKING, DAGENHAM AND BARNET

EMAIL: bdbhr@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 2, PRESS 2

ESSEX, KENT AND CORPORATE

EMAIL: EKC.hrforms@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 2, PRESS 3

HAVERING

EMAIL: haveringhr@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 2, PRESS 4

REDBRIDGE AND WALTHAM FOREST

EMAIL: redbridgewfhr@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 2, PRESS 5

MEDICAL STAFFING

EMAIL: medicalstaffinghr@nelft.nhs.uk

PHONE: 0300 300 1530, PRESS 3

HR SYSTEMS

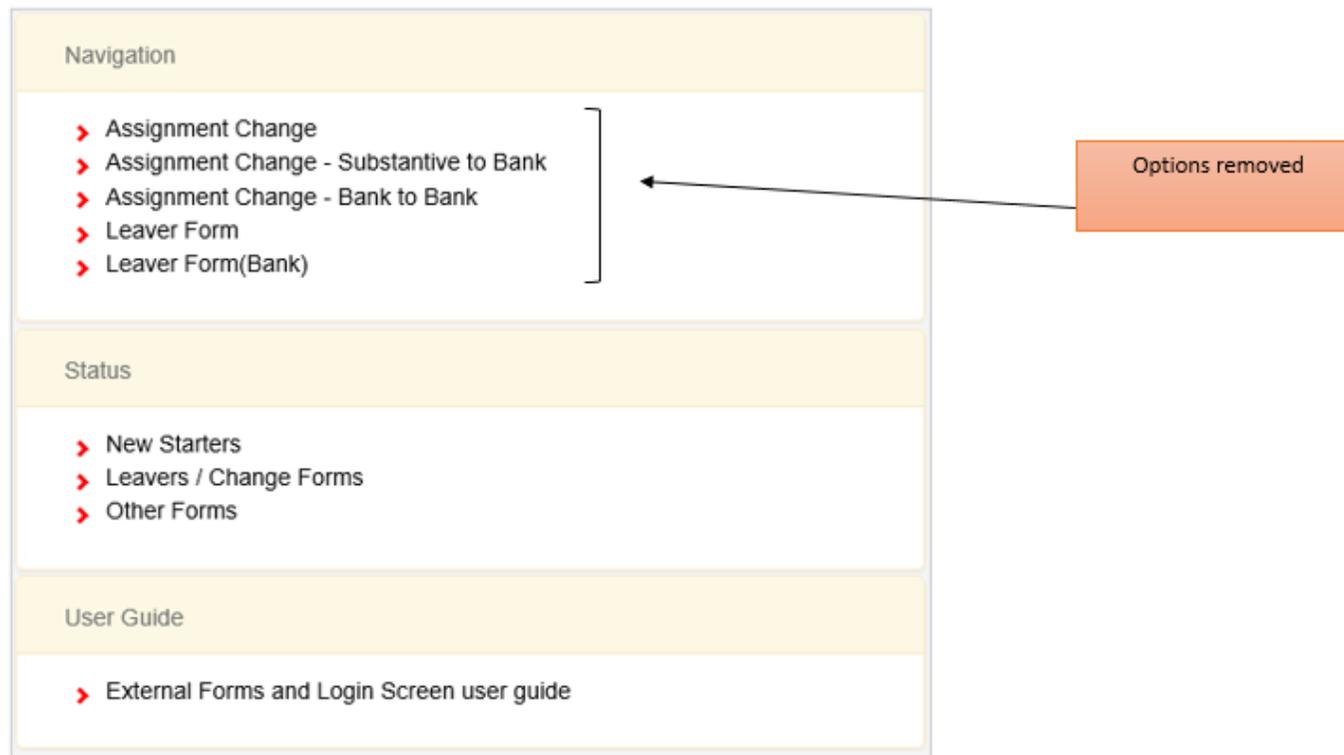
VISIT: <https://nelfthr.itclientportal.com/>

Table of Contents

Homepage.....	3
Reason for Submitting	5
Validation for '@nelft.nhs.uk' Email Addresses.....	5
Employee/Assignment Number	6
Reason for Leaving.....	7
Agenda for Change.....	7
Change in Hours	9
Generating a Leavers Form.....	10
Last Working Day/Last Day of Service	11
Query Back – Rejection of a Form.....	13
Query Back – Querying to a Specific Manager	14
Date Fields.....	15
Status Check	16
Status Check – Viewing a Form following Submission	17
Locality Filter	19
V1.4 System Admin Guide Default option for ELFS	20
Late Submit.....	20
Date Previous Team Actioned.....	20
Finance Dashboard	21
Payroll Actions/Payroll Checker	21
Temp Staffing – Bank Email Alerts.....	22

[Homepage](#)

A new function has been incorporated in the v1.4 upgrade whereby @nelft.nhs.uk email addresses require verification (further details below). Due to the way in which background checks function the homepage has been updated to remove links for initiating forms. You will now need to log in to process a form form on behalf of a Manager.



The screenshot shows a navigation menu with three main sections: Navigation, Status, and User Guide. The 'Navigation' section contains five items, the first three of which are grouped by a bracket and pointed to by an orange box labeled 'Options removed'. The 'Status' section contains three items, and the 'User Guide' section contains one item.

Section	Item
Navigation	> Assignment Change
	> Assignment Change - Substantive to Bank
	> Assignment Change - Bank to Bank
	> Leaver Form
	> Leaver Form(Bank)
Status	> New Starters
	> Leavers / Change Forms
	> Other Forms
User Guide	> External Forms and Login Screen user guide

Note: For secretaries, administrators or end users initiating change forms on behalf of their managers you will need to select 'Login as Employee' during the login process:

Please select login role below

Login as Employee

Login as other role

Upon logging in you will see the 'Create Forms' button along the top banner:

[Create Forms](#) [My Forms](#)

Create Form

- ▶ Assignment Change
- ▶ Assignment Change - Substantive to Bank
- ▶ Assignment Change - Bank to Bank
- ▶ Leaver Form
- ▶ Leaver Form(Bank)

User Guide

- ▶ External Forms and Login Screen user guide
- ▶ v 1.4Upgrade User Guide

Reason for Submitting

The Assignment Change form will now load with 'Reason for Submitting'. Please select one of the relevant options:

Reason for Submitting:

Select reason for submitting

Change of Banding

Change of Base

Change of Budget Code

Change of Hours

Change of Job Title

Change of Position Number

Change of Supervisor

Change of Team

Employee Email address:

Validation for '@nelft.nhs.uk' Email Addresses

Due to a high number of forms being submitted with typos in the email address field (resulting in the desired person not receiving the form), the functionality has been updated so users are required to validate the email address. Please see below:

Employee Email address:

Enter Email Address, First name OR Surname and click the 'Email' button

🔍 Email

Enter one of the following: First Name, Surname or Email Address and click the 'Email' button

Upon clicking the 'Email' button you will be presented with a pop-up box. Select the required person and press 'Click to select':

Please select correct email

Full name	Email	Job title	Action
Naveed Badshah	Naveed.Badshah@nelft.nhs.uk	Project Manager	<button>Click to select</button>

Once clicked, the Employee Email Address, Employee First Name and Employee Surname fields will be prepopulated and highlighted in green:

Employee Email address:

Employee First Name: Employee Surname:

NOTE: You will not be able to submit the form unless the steps above have been completed. Only @nelft.nhs.uk email addresses will be accepted.

Employee/Assignment Number

The Employee/assignment number field has been updated to allow for -1, -2, -3 etc where multiple Assignment Change forms have been submitted on separate occasions. The employee/assignment number will always remain the same, please end this with the relevant -1/-2/-3 so HR Teams are easily able to differentiate between forms.

Note: Only hyphens and forward slashes will be accepted.

Employee/assignment Number:

Reason for Leaving

The additional option of 'Employee already left' has been added to the 'Reason' field when 'Send to Employee' is set to 'No'.

Send to Employee:

Reason:

- Bank only leaver
- Career break
- Employee already left
- External secondment
- Long term sick
- Maternity leave
- Special Leave
- Suspension

Please select Yes where

- Moving from one budget/
- Changing Banding
- Changing Hours

Note: This option should only be used if you wish to bypass the Employee for whatever reason, in this instance the form will go directly to HR for authorisation. If the Employee is still in service/has access to a NELFT computer this should be set to 'Yes' allowing the person to review the form and provide an electronic signature.

Agenda for Change

Forms have been updated to allow users to either manually enter the Salary or use the Agenda for Change scheme to select the Band and relevant Spine Points.

To enter the Salary manually:

Agenda for change :

Please enter salary

Agenda for change: Select No
Within the 'Please enter salary' box enter the Salary amount

To enter the Salary using the Agenda for Change option:

Agenda for change : Yes

Financial Code:

Working Hours:

Incremental date:

Allowances:

Line Manager's Name:

Date of Change:

Band 4

Band-4, Spine Point 11 / ESR Point 182-£21,089.00
Band-4, Spine Point 12 / ESR Point 192-£21,089.00
Band-4, Spine Point 13 / ESR Point 200-£21,089.00
Band-4, Spine Point 14 / ESR Point 220-£21,819.00
Band-4, Spine Point 15 / ESR Point 230-£22,482.00
Band-4, Spine Point 16 / ESR Point 240-£22,707.00
Band-4, Spine Point 17 / ESR Point 250-£23,761.00

Band 5

Band-5, Spine Point 16 / ESR Point 242-£24,214.00
Band-5, Spine Point 17 / ESR Point 252-£24,214.00
Band-5, Spine Point 18 / ESR Point 270-£24,214.00
Band-5, Spine Point 19 / ESR Point 280-£26,220.00
Band-5, Spine Point 20 / ESR Point 310-£26,220.00
Band-5, Spine Point 21 / ESR Point 320-£27,260.00
Band-5, Spine Point 22 / ESR Point 340-£28,358.00
Band-5, Spine Point 23 / ESR Point 350-£30,112.00

Band 6

Band-6, Spine Point 21 / ESR Point 322-£30,401.00
Band-6, Spine Point 22 / ESR Point 342-£30,401.00
Band-6, Spine Point 23 / ESR Point 352-£30,401.00
Band-6, Spine Point 24 / ESR Point 360-£32,525.00
Band-6, Spine Point 25 / ESR Point 380-£32,525.00
Band-6, Spine Point 26 / ESR Point 390-£32,525.00
Band-6, Spine Point 27 / ESR Point 400-£33,587.00
Band-6, Spine Point 28 / ESR Point 410-£34,782.00
Band-6, Spine Point 29 / ESR Point 420-£37,267.00

Band 7

Band-7, Spine Point 26 / ESR Point 392-£37,570.00
Band-7, Spine Point 27 / ESR Point 402-£37,570.00

Agenda for change: Select **Yes**

Using the dropdown box, select the required Band and Spine Point

Change in Hours

Where there is a change in hour's, guidance has been provided to explain when this option should be used. Please ensure you read the notes and select the correct option. Failure to do so will result in the form being queried back (rejected) and cause delays:

Please select Yes where an employee is changing any of the following:

- Moving from one budget/team to another
- Changing Banding
- Changing Hours

If you enter the details this can be updated on HealthRoster by the HR Systems team and will avoid rostering problems for these staff.

Non-Rostered Unit (Personal Pattern)

This is for any staff with a Set Rotating Pattern. The Pattern can be weekly, fortnightly, or any length, as long as it repeats on a regular basis. For weekly rotating patterns you can complete the timetabled box, for any patterns for a different length, please complete the free text box called "Non Rostered Additional Comments" with details of the pattern.

Rostered Unit (No Pattern)

This is for any staff who do not have a set rotating pattern and could work any available shifts across the various days the service operates. If a staff member never works a certain shift that your service has, e.g. On a 24 hour service Unit, but the employee never works any Night Shifts, please enter this in the free text box called "Shifts not worked by the staff member at all?" To show any shifts that the staff member can or cannot work on certain days of the week, e.g. They cannot work Early shifts on a Tuesday, then in the Tuesday Row, Under Early you would select "No" To update us of any other relevant information on how the shifts for the staff member should roster e.g. they only work 2 Late shifts a week, please enter this into the free text box called "Rostered Additional Comments"

Does the change involve any working patterns or restrictions that need to be made within the Healthroster?

Does the change involve any working patterns or restrictions that need to be made within the Healthroster?



Generating a Leavers Form

Following feedback from HR Teams the process for generating a Leavers form has been revised. The updated method for generating a form is listed below:

Is the employee leaving the organisation: No

Is the employee remaining on the Bank: No

Result: Form appears

Is the employee leaving the organisation: No

Is the employee remaining on the Bank: Yes

Are they transferring to Bank: No

Result: Form appears

Is the employee leaving the organisation: Yes

Is the employee remaining on the Bank: Yes

Result: Form appears

Forms-Leavers	
Is the employee leaving the organisation?	
Yes	▼
Is the employee remaining on the Bank?	
Yes	▼

Last Working Day/Last Day of Service

The calendar icon has been updated to allow entry for an elapsed date (staff members who have already left the trust) and the Leavers form is being completed retrospectively. In the interest of best practice forms should always be submitted prior to the staff member leaving allowing them to have sight of the form and provide an electronic signature.:

Last Working Day:

Annual Leave Overtaken (if applicable):

Last Day of Service:

Forwarding Address (if known):

Name of new Employer (NHS Trust):

« April 2020 »						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Clear

Job Title:

Section/Workbase:

Position Number:

Last Working Day:

Annual Leave Overtaken (if applicable):

Last Day of Service:

« April 2020 »						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Clear

Upon selecting the desired Last Working Day/Last Day of Service a pop-up box will appear providing guidance on how this should be completed. Please see below:

Last date of service or last working day are in future or current date ×

Please note:

Last day of service ensure that the date is extended to include Saturday & Sunday and/or bank holidays (if applicable) if the employee is moving to another NHS employer.

Please ensure you have taken into account any outstanding leave when determining the employee's last day of service e.g.If the Employee's last working day is 10.10.2019 and they are owed 3 days annual leave you will need to extend the last day of service.

If last day of service is before the last working day;
The last day of service cannot be before the last working day, please review your dates before submitting.Should you need assistance please contact your local HR team.

Query Back – Rejection of a Form

When a form has been rejected (queried back) for whatever reason a red icon will appear beside the form. Hovering over the icon will display details of why the form was queried back, this then allows you to correct the form and approve it allowing it to move onto the next stage e:

Flag	Surname	First Name	Locality	Form Reference	Form Type	Effective Date	Date Previous Team Actioned	Hard Copy	View Form Details
	Badshah	Naveed	Corporate Services	AC/17565	Assignment Change	13-04-2020			View Details
⚠	Fazal	Ehsan	Acute Rehabilitation	ACS/17530	Assignment Change Substantive	18-02-2020	19-02-2020		View Details

Show 1

Query

Query Status: Unresolved

Form name : AssignmentChangeSubstantive

Form ref number : 17530

Query raised by : Gurprem.Hayre@nelft.nhs.uk

Query raised stage : Manager

Query raised date time : 19-02-2020

Team :-

Query resolved date time :-

Query : Form has bypassed the Employee. Please review

Resolution :-

[Cancel](#)

Once the query has been resolved a green tick will appear and detail the action taken:

Flag	Surname	First Name	Locality	Form Reference	Form Type	Effective Date	Date Previous Team Actioned	Hard Copy	View Form Details
✓	Badshah	Naveed	Corporate Services	ACS/17535	Assignment Change Substantive	20-02-2020	11-03-2020	--	View Details

Query

Show 1

Flag

✓

⚠

Showing

Query Status: Resolved

Form name : AssignmentChangeSubstantive

Form ref number : 17535

Query raised by : naveed.badshah@nelft.nhs.uk

Query raised stage : Manager

Query raised date time : 20-02-2020

Team : HR New Form

Query resolved date time : 11-03-2020

Query : Form has bypassed the Employee. Please review.

Resolution : HR new Form has updated and authorised Assianment Chanae Substantive

Cancel

NOTE: As the form progress through the various stages the query, detail and resolution will be displayed throughout the lifecycle of the form:

Query Back – Querying to a Specific Manager

Where a form has been initiated due to a change in team/manager the 'Is this employee leaving your service' box would have been ticked requiring details of the 'new' manager to be entered. Upon submission the 'new' manager is required to sign the form before it can move on to the following stages. If a Finance or HR team are required to 'Query' the form you are now able to select which Manager is required to take corrective action. Select the 'Query' option within the 'Action' field to display:

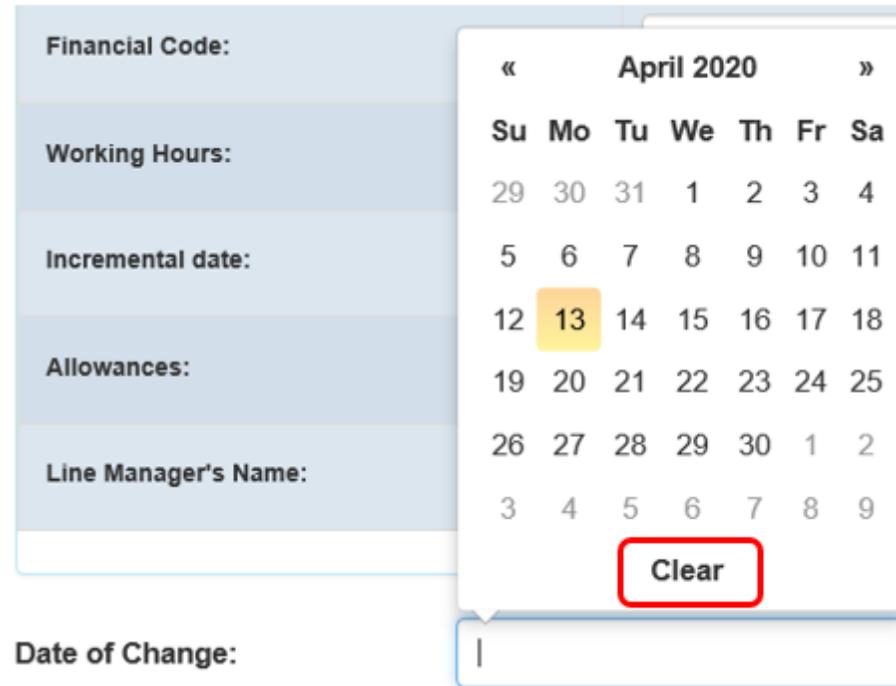
Action:

Approve
Query to Finance
Query to new Manager (Naveed Badshah)
Query to current Manager (Naveed Badshah)

Note: The image above is for illustration purposes only. Using a real scenario the relevant manager's names will appear.

Date Fields

Previously the system would not allow for removal of a date once it had been selected using the Calendar function. A 'Clear' button has now been inserted allowing you to remove a date that was entered incorrectly without having to reload the screen. This function has been updated for all fields where date is required.



The image shows a web form with several fields: Financial Code, Working Hours, Incremental date, Allowances, and Line Manager's Name. A calendar pop-up is displayed over the form, showing the month of April 2020. The date 13 is highlighted in yellow. A red box highlights a 'Clear' button at the bottom of the calendar. Below the calendar, the 'Date of Change' field is visible, containing a vertical bar cursor.

April 2020						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Clear

Date of Change: |

Status Check

The 'StatusCheck' function has been vastly improved to provide more information on the status of the form. Depending on the details entered within the form will determine the relevant authorisation stages, this will be reflected within the Status Check banner. In the example below an admin member of staff has initiated the form on behalf of a Manager and the 'Is this employee leaving your service' box has been left unticked (meaning the New Manager approval is not required). Please see image below for further information:

Form Details		
User:	Naveed Badshah	Mark as Deleted View Details
Email:	Naveed.Badshah@nelft.nhs.uk	
Form Title:	Assignment Change	
Manager Name:	nav	
Manager Email:	naveed.badshah@nelft.nhs.uk	
Form Reference Number:	AC/17564	

Stage-1	Stage-2	Stage-3	Stage-4	Stage-5	Stage-6	Stage-7	Stage-8	Stage-9	Stage-10
Admin Complete	Manager Approve	New Manager Approve	EmployeeSign	Finance Approve	HR	Payroll	HR Systems	Checking	Complete
✓ Complete	✓ Complete	- N/A	* Required	* Required	* Required	* Required	* Required	* Required	* Required

Admin/PA initiated the form
Note Complete icon

Manager has reviewed the form and authorised
Note Complete icon

N/A will appear when that authorisation stage is not required. Forms will bypass this stage

Indicates various Team required to authorise the form before it moves to the 'Complete' stage
Note * Required icon

Status Check – Viewing a Form following Submission

Prior to the v1.4 upgrade once a form had been submitted it moved onto the next stage meaning the previous authoriser could no longer view the form. This function has now been updated so a form can be viewed regardless of which stage it is at e.g. Manager, Finance, HR etc. Instructions are listed below:

Using the Status Check box via the panel on the left hand side select the relevant option e.g. Leavers/Change form (New Starters are not being used at this point in time):

The image shows a vertical navigation menu with four main sections, each with a yellow header and a white body. The sections are: 'New Starters', 'Leavers / Change Forms', 'Create Forms', and 'Status Check'. The 'Status Check' section is highlighted with a red rounded rectangle. The 'Leavers / Change Forms' section has a red underline and a grey background for its first item, 'Manager - Action', which has a '3' in a circle next to it. The 'Create Forms' section has three items: 'Assignment Change', 'Assignment Change - Substantive to Bank', and 'Leaver Form'. The 'Status Check' section has three items: 'New Starters', 'Leavers / Change Forms', and 'Other Forms'.

New Starters	
> Manager - Action	0
> Complete Forms	0
Leavers / Change Forms	
> Manager - Action	3
> Completed	1
Create Forms	
> Assignment Change	
> Assignment Change - Substantive to Bank	
> Leaver Form	
Status Check	
> New Starters	
> Leavers / Change Forms	
> Other Forms	

Managers will see the image below. **The Surname and Form Reference ID are required** (you will receive an email containing the Form Reference ID, alternatively use the 'Manager – Action' button in the image above):

Leaver/Change Status Check

Surname:

Form Reference id:

Finance/HR Teams will see the image below, additional options are provided allowing for increased search parameters:

Leaver/Change Status Check

Surname:

ForeName:

Locality:

Workbase:

Manager name:

Form Reference id:

Once the relevant details have been entered the image below will appear. Using the green 'View Details' button you will be able to view the form in its entirety:

Leaver/Change Status Check

Form Details

User:	Naveed	Mark as Deleted View Details
Email:	naveed.badshah@nelft.nhs.uk	
Form Title:	Assignment Change - Substantive	
Manager Name:	Nav	
Manager Email:	naveed.badshah@nelft.nhs.uk	
Form Reference Number:	ACS/17535	

Note: Only users with System Admin access (reserved for HR Teams) will have the option to Mark as Deleted. If a form has been submitted in error please contact your locality HR Team to have this marked as deleted (the I.T Service Desk are unable to complete this for you).

Locality Filter

The behaviour of the Locality Filter has been updated. If the incorrect option is selected it will only display results for that particular Locality, **please ensure you have the correct option selected**. Alternatively you can use the 'Select All' option to display all matching results.

The Locality Filter can be found at the top of the screen:



[System Admin](#) [HR](#) [HR Systems](#) [Manager](#) [Finance](#) [HR Temp Staffing](#)

Filter Locality Please select from list [Go Back](#)

V1.4 System Admin Guide

Default option for ELFS

When a form is in the 'Checking' stage the default option for 'Send email to ELFS' has been updated from No TO Yes:

Send email to ELFS:

Yes No

Late Submit

Where there has been a delay in submission of a form a 'Late Submit' button has been introduced. Upon selection of this field a reason will need to be provided. See image below:

Late submit: Late submitted by:

Action:

Please select

- Employee
- Finance
- HR
- HR Temp Staffing
- HR System
- Manager

Date Previous Team Actioned

The above field has been introduced displaying the date the previous authorisation stage actioned the form in question. This is a particularly useful function to easily identify the newest forms in your queue making it easier to manage workloads.

HR Leavers / Change Forms-New Form										
Show 100 entries										
Flag	Surname	First Name	Locality	Form Reference	Form Type	Effective Date	Date Previous Team Actioned	Hard Copy	View Form Details	
	Badshah	Naveed	Corporate Services	AC/17565	Assignment Change	13-04-2020			<input type="button" value="View Details"/>	
▲	Fazal	Ehsan	Acute Rehabilitation	ACS/17530	Assignment Change Substantive	18-02-2020	19-02-2020		<input type="button" value="View Details"/>	
	Fazal	Ehsan	Corporate Services	AC/17561	Assignment Change	17-03-2020	16-03-2020		<input type="button" value="View Details"/>	

[Finance Dashboard](#)

The dashboard within the Finance section has been updated to include Financial Code allowing users to filter forms by the relevant code:

Finance Leavers / Change Forms-New Form

Show entries Search:

Flag	Surname	First Name	Locality	Form Reference	Form Type	Financial Code	Effective Date	Date Previous Team Actioned	View Form Details
------	---------	------------	----------	----------------	-----------	----------------	----------------	-----------------------------	-------------------

[Payroll Actions/Payroll Checker](#)

To reflect a true working pattern the authorisation process for the above fields have been reversed:

Authorised

Manager Print Name:	<input type="text" value="Naveed Badshah"/>	Date:	<input type="text" value="Date"/>
Employee Print Name:	<input type="text" value="Employee Signature"/>	Date:	<input type="text" value="Date"/>
Finance Print Name:	<input type="text" value="Finance Signature"/>	Date:	<input type="text" value="Date"/>
Processed by HR:	<input type="text" value="HR Signature"/>	Date:	<input type="text" value="Date"/>
Payroll Action by:	<input type="text" value="Please print full name"/>	Date:	<input type="text" value="Date"/>
Payroll Action Checker:	<input type="text" value="Checker Signature"/>	Date:	<input type="text" value="Date"/>
Processed by HRSystem:	<input type="text" value="HR System Signature"/>	Date:	<input type="text" value="Date"/>

Temp Staffing – Bank Email Alerts

Email alerts triggered from the HR Temp Staffing section have been updated advising the end user which assignment number has been terminated. Due to people having multiple assignment numbers this caused confusion on some occasions as the person thought their entire enrolment or their permanent/secondment/fixed term assignment had ended.

The email alert will now read as follows:

Dear [NAME],

I have been informed that your bank assignment [ASSIGNMENT NUMBER] has been terminated as of [DATE] and payroll have been informed.

If there are any issues relating to this change or if you are leaving the Trust and would like to discuss any concerns before you leave, please do not hesitate to contact the Temporary Staffing Team as part of the Human Resources department on 0300 300 1530 Option 1.

If you were in receipt of any Trust property or equipment (clinical or non-clinical) please return to your manager before leaving, e.g. Name badges, security passes and clinical diaries.

May I take this opportunity to wish you every success for the future.

Yours sincerely,

NELFT Human Resources Department

0300 300 1530

Note: Fields within brackets will automatically be inserted with the relevant names, numbers and dates.