

Portal User Guide (HR Manager)

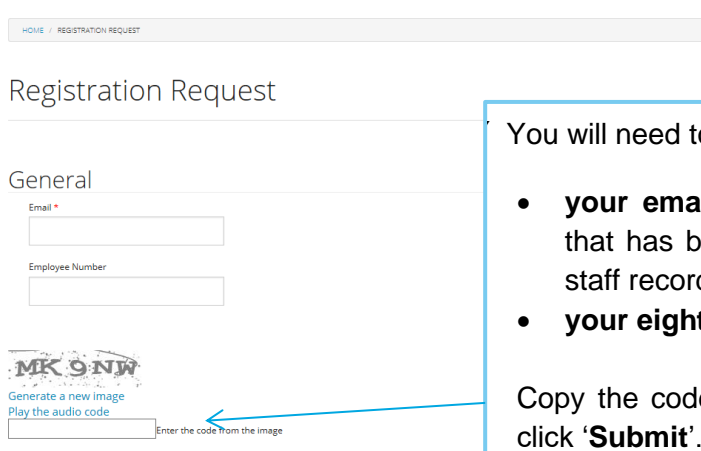
All the employee and case details in this document have been made up for training purposes.

This is a quick guide on how to access and navigate around the NHS SBS self-service portal if you have HR Manager access on your profile.

Please note: Only registered users can access the portal.

How to register

To register click on this link: <https://nhssbs.microsoftcrmportals.com/registrationrequest/>



You will need to enter:

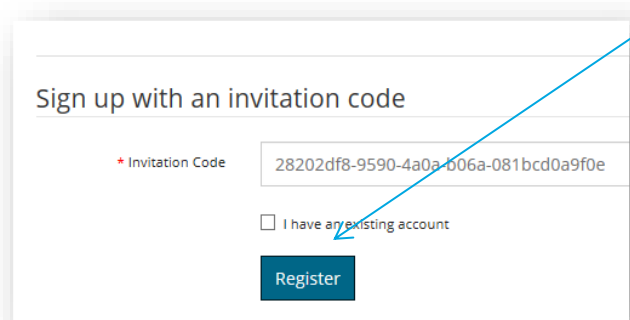
- **your email address** (this is the NHS email address that has been associated with you in ESR (electronic staff record) system by the HR team)
- **your eight digit assignment / employee number**

Copy the code displayed on the screen into the box and click **'Submit'**.

You will then receive an email with a link to the portal (please note, this is not instant as the employee service helpdesk have to validate all registration requests where the employee has HR Manager permission). If you receive an error message or your email address isn't accepted, please contact our Employee Service desk on 0303 123 1144.

Once you receive the portal invitation email, click on the link to accept the invitation.

This link will take you to the following screen:



Click **'Register'**

You will then be asked to create and enter a username and password.

The password must contain eight characters including one uppercase letter, one special character (*!&%\$£) and one number.

Once you submit these details, your account will be created.

How to Sign in

Once you are registered and have created your username & password, you can sign in to the portal from any PC, laptop, tablet or smartphone using this link:

<https://nhssbs.microsoftcrmpartals.com/SignIn?returnUrl=%2Fregistrationrequest%2F>

(We suggest you save this to your favourites for easier access in the future)

Enter your username and password and click **'Sign In'**

The screenshot shows the sign-in page with the following elements:

- Navigation menu: Knowledge Base, My Support, Feedback, Registration, Search, Sign in
- NHS Shared Business Services logo
- Section: Sign in with a local account
- Form fields: *Username, *Password, Remember me? checkbox
- Buttons: Sign in, Forgot your password?, Forgot your username?

Callout boxes provide additional instructions:

- Forgot your password:** If you are unable to log in and have forgotten your password, click **'Forgot your Password'**. You will be asked to enter the email address you used to register, so a password reset can be provided.
- Forgot your username:** If you are unable to log in and have forgotten your username, click **'Forgot your Username'**. You will be asked to enter the email address you used to register and then an email will be sent out containing your username.

If you receive an error message or you have any issues getting a password reset, please contact our Employee Service desk on 0303 123 1144.

Once in the portal you will land on the home page, from here you can:

The screenshot shows the home page with the following elements:

- Navigation menu: Knowledge Base, My Support, Feedback, Registration, Search, Alice Simmonds
- NHS Shared Business Services logo
- Header text: We are working to delivering a... NHS by 2020. Achiev... transforming at scale and digital technol...

Callout boxes provide instructions:

- Knowledge Base:** Access the **Knowledge base** articles to answer general questions.
- My Support:** Go to **My Support** to log a new case or view previously logged open or closed cases. *A case is a query you have raised with NHS SBS via this portal or by calling the helpdesk.*

Viewing and updating your profile

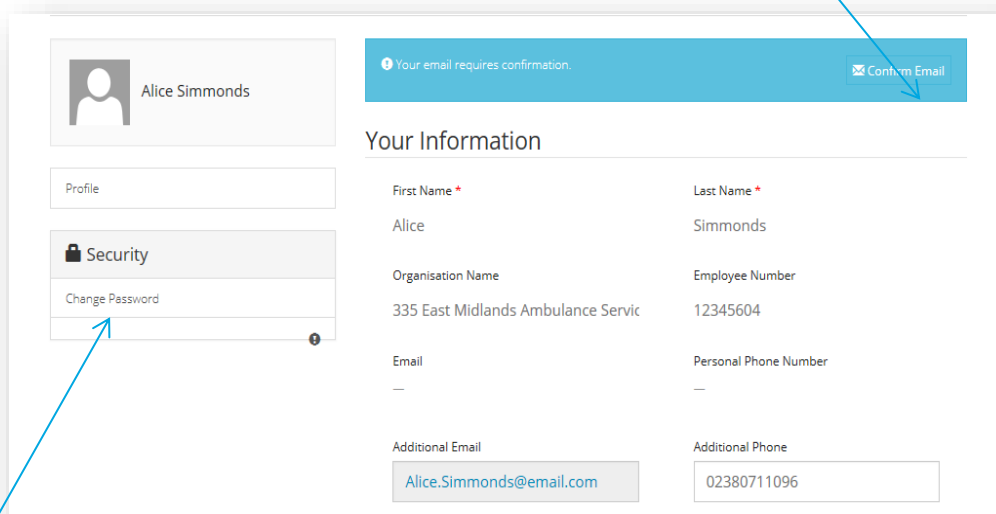
If you wish to view your profile information, click on your name at the top of the screen and select **Profile**.

This will display your key profile information, most of this is populated from ESR, so can't be amended but you can update your additional phone number and job title. If you do make any changes please click on the **'update'** button.

If you believe your organisations has requested you have HR Manager access to raise cases on behalf of your staff, please check to ensure you are showing as an HR Manager in the **'Roles'** section at the bottom of your profile (this is separate to the Job Title field). If you are not, please contact your Manager to get this approved and the information sent over to NHS SBS.



If this is your first time viewing your profile, you will be asked to confirm your email address is correct by clicking the **'Confirm email'** button; this will then generate an email to be sent to you.

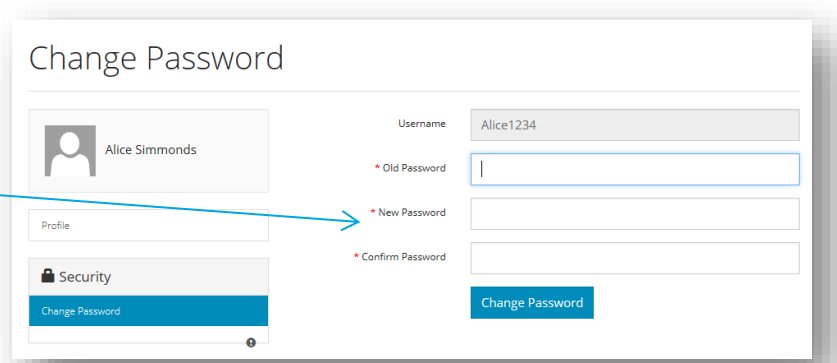


Security; if you wish to change your password, you can do so by clicking on 'change password'

This will then ask you to add your old password, your new password and repeat the new password to ensure it's correct.

The new password must contain eight characters including one uppercase letter, one special character (*!&%\$£) and one number.

Then click **'Change password'** to confirm the change.



Using the Knowledge base

If you have a general question about your pay or an employees pay, rather than calling the helpdesk in the first instance you can now use the knowledge base articles to find the answer.

To access the knowledge base, click on **'Knowledge Base'** at the top of your screen.

Underneath the 'What can we help you with?' Box, type your case or a key word i.e. *Sickness* into the search box (*you do not need to add a question mark*).

The system will normally automatically search for matching results but if not click on the magnifying glass to start the search.

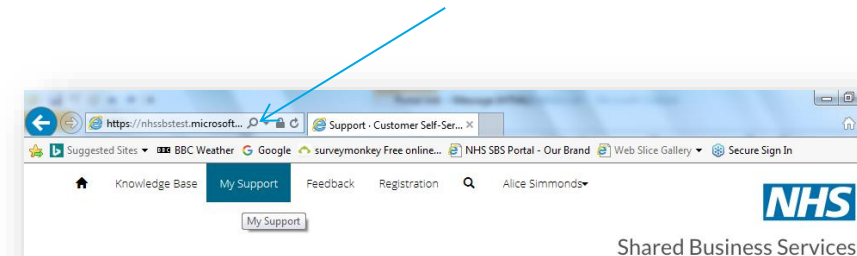
The screenshot shows the 'Knowledge Base - Home' page. At the top, there is a search box with the text 'What can we help you with?' and a magnifying glass icon. Below the search box, the text 'Sickness pay' is entered. A list of search results is displayed, with the first result titled 'What is SSP?' in blue. A callout box points to this result with the text: 'You will see a selection of articles displayed under the search box, which contain the key words you entered. To view any of these articles and find the answer to your questions, click on the article header (in blue) and this will display the full article for you to read.' Below the search results, another callout box points to a 'Print' icon in the top right corner of an article preview with the text: 'You will also see you have the option to print the article by clicking on the little printer icon in the top right corner. (Please note; printing is only available if the PC or tablet you are using is connected to a printer)'. The article preview for 'What is SSP?' shows the title, a 'Views: 32' indicator, and the beginning of the article text: 'SSP stands for Statutory Sick Pay. When you are on sick leave your pay is normally made up of two parts: Occupational Sick Pay and Statutory Sick Pay. Statutory Sick Pay (SSP) is a guaranteed minimum wage that you are entitled to receive by law when you are sick (provided you satisfy certain conditions) and this is paid by the Trust. OSP is under agenda for change based on basic pay only and SSP will be included in payment whilst on full pay entitlement. If you go to half pay, then SSP will be paid in addition to your half pay. For more information please see: <https://www.gov.uk/statutory-sick-pay>'.

If you do not find the answer you are looking for, you can now log your own case via **'My Support'** on the portal or if need be you can still call the Employee Service desk on 0303 123 1144

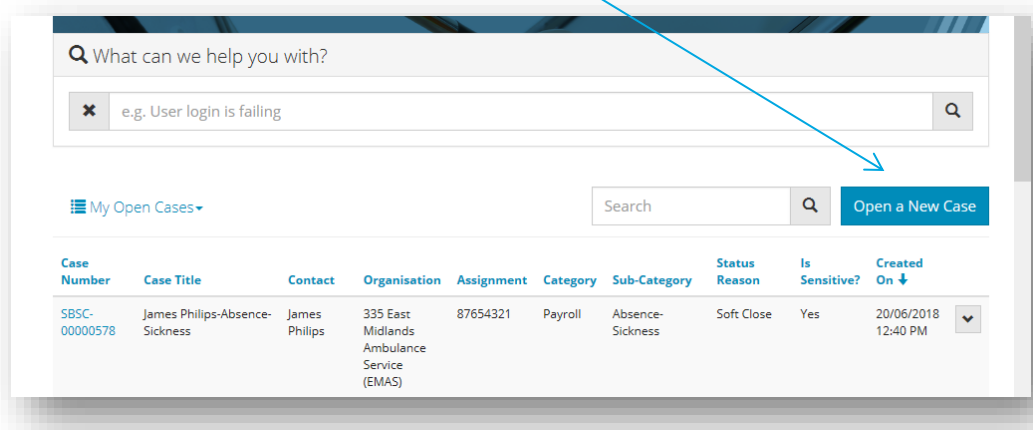
Using 'My Support' to log a case (for your own query)

If you have not found the answer to your query in the Knowledge Base article, you can send your query direct to the NHS SBS team by logging a case on the portal.

To do this click on 'My Support' at the top of the screen:



There are various options in My Support such as access to the knowledge articles and a list of previously logged cases but to open a new case, you need to scroll down on the page and click on the blue 'Open a new case' button.



This will take you into the new case screen and ask you to provide various details to assist the NHS SBS staff to resolve your case.

Please note, the next page is designed to help you create a case for yourself and gives you key details on each field to complete, if you need to log a case on behalf of an employee, please also read pages 7 & 8 as they detail the different information that is required.

Open a New Case

Raised By: will show your name

Is Sensitive?: This is only applicable if an HR Manager is raising a case on behalf of an Employee, so leave as NO.

Availability: Use the dropdown arrow to pick, if you are only available for a call back at specific times.

Assignment: If you click on the Magnifying glass, it will show your assignment number(s) to choose from or you can type in the box.

Organisation & contact: will populate automatically.

Category: click on the drop down arrow to choose the category applicable to this query i.e. Payroll, pensions or Overpayments

Sub-Category 2: Please now select a final category based on your sub category selection.
Click on the drop down arrow to choose to most applicable sub category 2.

Sub-Category: Please advise us of the key detail of your query i.e. if it's about your maternity leave, you would select Absence.
Click on the drop down arrow to choose to most applicable sub category.

Raised By *
Helen Trainer

Is Sensitive? ?
 No Yes

Organisation *
NHS Portsmouth CCG

Contact *
Helen Trainer

Assignment
Availability Details

Category *
Payroll

Sub-Category *
Absence

Sub-Category 2 *
Maternity

In order to ensure that your information is as secure as possible please do not include any personal or sensitive information in the free text field. Information that can be used to identify you or another person is subject to protection under UK law and should not be provided where it is not required. Some examples of personal information are: National Insurance number, home address and home telephone number. Some examples of sensitive information are: sickness or absence reasons, salary information, pension entitlements, bank account details, pay and deductions.

Description *

Description: Please add as much information about your query as possible to assist the NHS SBS team to resolve it. Please do not include any personal identifiable data such as NI number, bank details, salary or sickness information.

Once it is all complete, You will be asked to tick to say you have read the GDPR privacy notice (you can click on the link (in blue) to read the notice first). Then please click **'Submit'**. Your query will then be sent to the NHS SBS team

I have read, understand and accept your [GDPR Privacy Notice](#).

This case screen will close and you will see a green bar with your case reference number pop up.

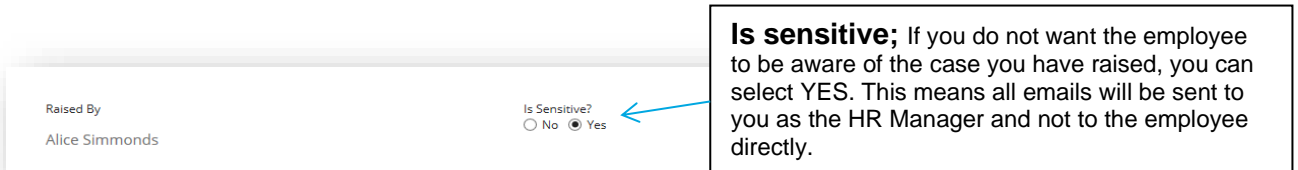


Using 'My Support' to log a case (on behalf of an employee)

If you have the HR Manager role that means you are able to log a case on behalf of one of your employees.

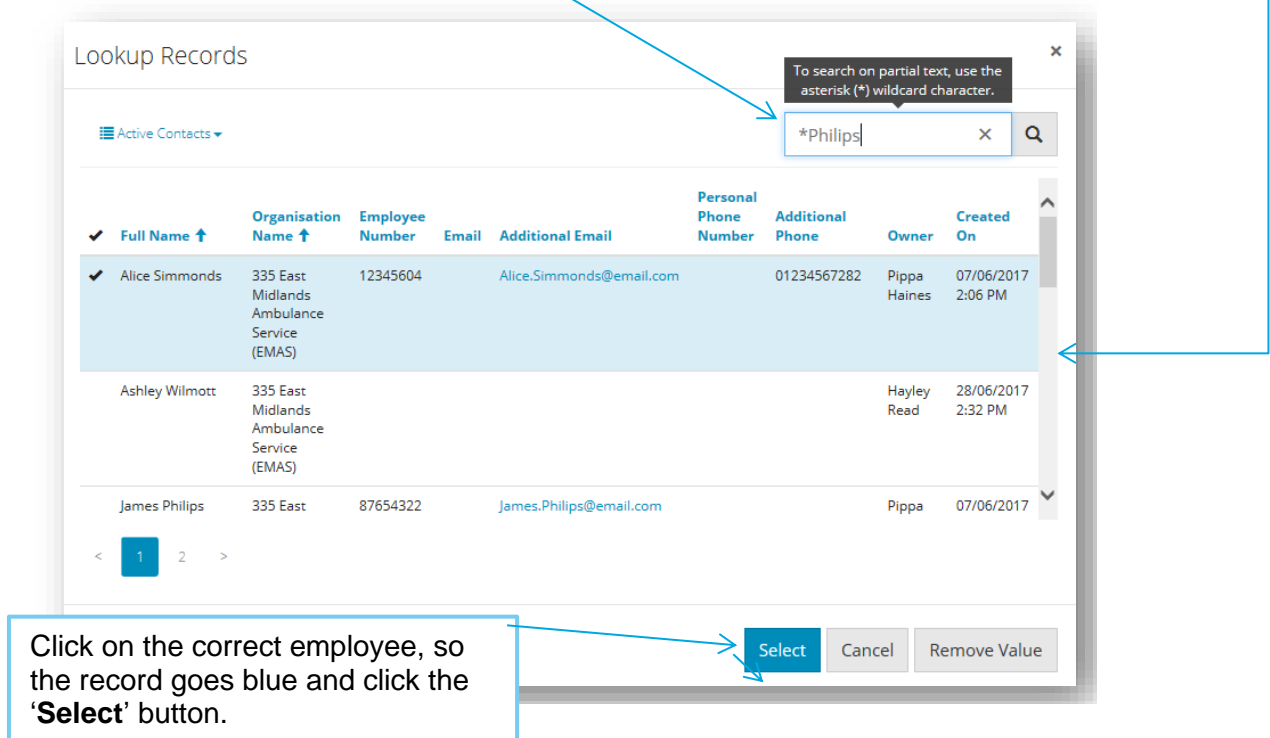
Click into 'My Support' and click on 'Open a new case' as above.

When you are raising a case on behalf of an employee you have two additional options:



The new case will show your name in the 'Raised By' field but your name will also show in the 'Contact' field, as the system does not know that you wish to raise a case on behalf of someone else, so you need to click on the 'X' to clear the contact field and then click on the Magnifying glass in order to search for the employee you wish to raise the case about.

In the lookup records screen, you can either use the right scroll bar to scroll through all the employees for your organisation or enter the surname in the search field using the *wildcard. So if you are looking for James Philips enter ***Philips** and click on the magnifying glass.



Contact; will now show as the employee you are raising a case about

Assignment; To add the correct assignment number for this employee, click on the magnifying glass, this will display any assignment numbers applicable to this employee at your organisation, click on one to turn it blue and then click the 'Select' button. This will add the assignment to the Assignment field.

✓	Id ↑	Contact
✓	87654321	James Philips

If you can only see your assignment number(s) it maybe that you are still showing as the Contact.

You can then select the correct category and sub category and enter the case description. (Refer back to page 6)

If this is a sensitive case and you do not want it discussed with the employee, it is also advisable to note this in the description.

Sensitive cases

If you selected '**is sensitive**'; YES, the case will show in your '**My Support**' section when you log on to the portal but it will not be visible when the employee is logged onto their profile on the portal.

If your select '**is sensitive**'; NO, then the case will be visible on the portal to both you and the employee and the employee will receive the automatic email notifications.

Using 'My Support' to track your cases

If you have raised any cases through the Employee helpdesk or directly on the portal, they will all be available to view in the 'My Support' section.

To do this click on 'My Support' at the top of the screen:

You need to scroll down on the page and you should see your open cases:

The default is to show just your open cases, these are any that have not yet been resolved and closed. You can use the drop down arrow to amend the search to closed cases or all cases if you prefer.

Case Number	Case Title	Contact	Organisation	Assignment	Category	Sub-Category	Status Reason	Is Sensitive?	Created On ↓
SBSC-00000585	Alice Simmonds-Absence-Maternity	Alice Simmonds	335 East Midlands Ambulance Service (EMAS)	12345678-6	Payroll	Absence-Maternity	In Progress	No	31/07/2018 4:04 PM
SBSC-00000578	James Philips-Absence-Sickness	James Philips	335 East Midlands Ambulance Service (EMAS)	87654321	Payroll	Absence-Sickness	Soft Close	Yes	20/06/2018 12:40 PM
SBSC-00000577	James Philips-Absence-Sickness	James Philips	335 East Midlands Ambulance Service	87654321	Payroll	Absence-Sickness	Soft Close	Yes	19/06/2018 3:34 PM

Cases will be displayed in order of creation, with the newest at the top.

You can search for a specific case by entering the:

- case number (rather than typing the full case number SBSC-00000578 you can just type ***578**)
- the case title (use the * wildcard to search for a key word, i.e. ***Maternity**)
- Employee surname i.e. ***Philips**. (if you have raised cases on behalf of your employees)

In the search box and clicking on the magnifying glass.

This will display any cases that match your search criteria.

To open and view the case, click on the blue case number on the left hand side.

Please note once you click into a case, your search criteria will be removed and you would need to search again.

Is Sensitive; this is only applicable if an HR Manager raised a case on your behalf – so this will generally show as NO.

The open case view will show all the info that was added when the query was raised;

- Case number
- Your NHS organisation
- Your name (contact)
- Your assignment number
- Availability details (if entered)
- The category, sub category & Sub category 2 of the query
- When the case was created
- When last updated

Raised By; this will generally show your name, unless an HR Manager raised the case on your behalf.

Description; is the information you provided to the helpdesk or that you added when raising the case on the portal, please note it should never include any personal identifiable date, such as bank details or NI number. This is the info NHS SBS will use to resolve your query.

Add Comment; If you wish to add an additional comment or info to this open case, you can do so by clicking on the 'Add Comment' blue button.

If this additional information is high priority, we would suggest calling the employee helpdesk and quoting the case reference.

Using 'My Support' to add comments and view comments

If you click on '**Add Comment**' at the bottom of an open case, you will get a pop up, asking you to enter your information:

Add a Comment x

* Comment

Attach a file Browse...

Submit Cancel

You can add additional information in the comments box, please do not add any personal identifiable data i.e. NI number, sickness info in this comment box.

Any comments added by you will be displayed at the bottom of the case...

Timeline

about a minute ago
Modified on 19/11/2019
11:35 AM

Pippa Coach → Helen Elderton
Please find attached the documents you have requested.

Created by SYSTEM

Documents for CRM Portal.docx (12.21 KB)

Update Resolve Case

Add Comment

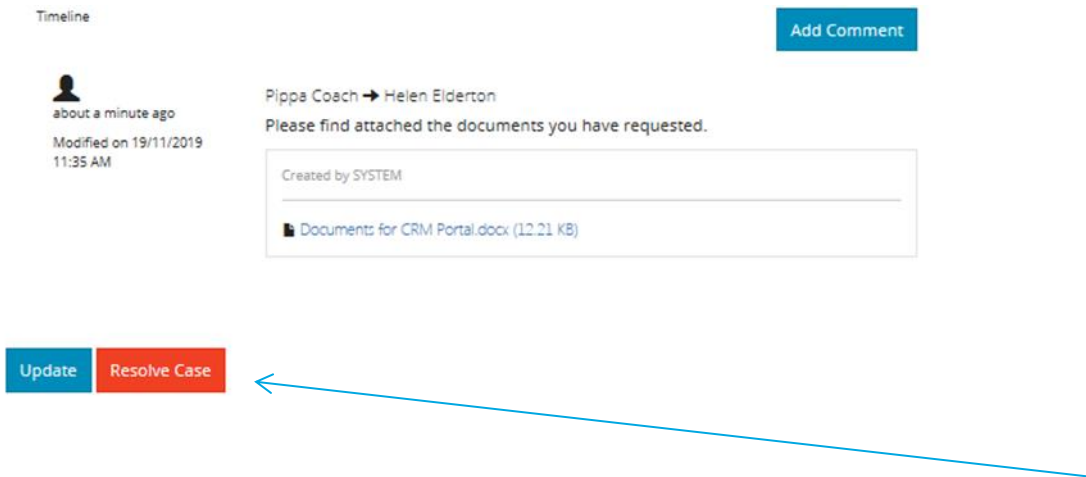
To update the case and save the new comment click on the blue '**Update**' button and this will send a notification to NHS SBS that you have amended a case.

Please note the NHS SBS team can also add comments to the case, for you or an employee to view here on the portal:

- *If you have raised your own case, you will receive an email notification that comments have been added*
- *If you have raised a non-sensitive case on behalf of an employee they will receive an email notification that comments have been added*
- *If you have raised a sensitive case about an employee you will receive an email notification that comments have been added.*

How to close a case on the portal

If you no longer need the information from NHS SBS or have managed to solve the query yourself, you are able to resolve and soft close the case directly on the portal and therefore stop the NHS SBS team from working on it.



To resolve and soft close a case, add a comment and update and then click on the red '**Resolve case**' button.