

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

Portal User Guide (HR Manager)

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 must validate all registration requests where the employee has HR Manager permission). If you receive an error message or your email address is not 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.

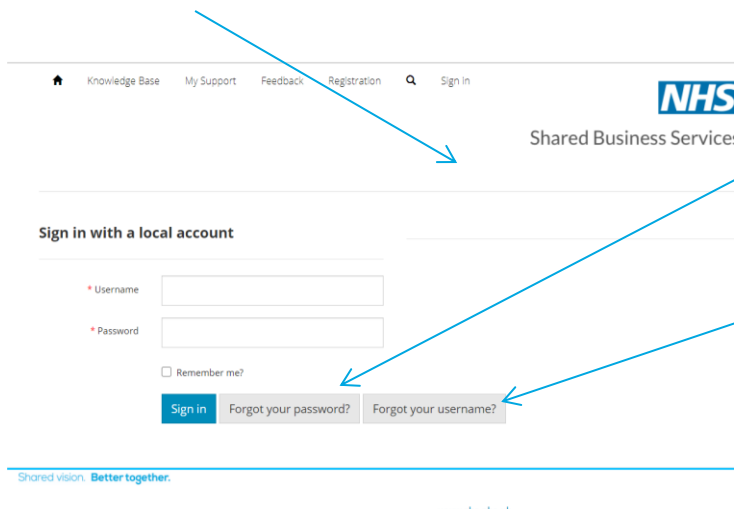
How to Sign in

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'**.

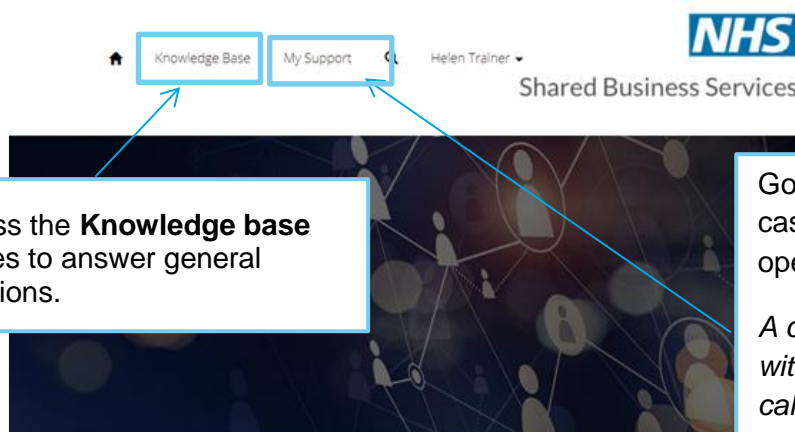


If you are unable to log in and have forgotten your password, click **'Forgot your Password'**.
You will be asked to enter the email address you used to register, so a password reset can be provided.

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 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:



Access the **Knowledge base** articles to answer general questions.

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.

Self Service Portal

Welcome to the Employment Services Self Service Portal. Once you are logged in, you can find answers to frequently asked questions and raise and track any queries directly with our dedicated payroll and pensions teams.

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 cannot 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.

Roles	Type ↑	Start Date	End Date
	HR Manager		

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 is 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.

HOME / KNOWLEDGE BASE - HOME

Knowledge Base - Home

The Knowledge Base contains numerous support references, created by our support professionals who customers. It is constantly updated, expanded, and refined to ensure that you have access to the very la

Q What can we help you with?

x sickness

Sickness

... Q. Can you tell me what my **sickness** entitlement is?A. Employees are entitled to **sick** pay as per NHS Terms and Conditions, depe

Knowledge Base

Most Popular

Most Popular Articles

SICKNESS

Views: 369

Q. Can you tell me what my sickness entitlement is?

A. Employees are entitled to sick pay as per NHS Terms and Conditions, depend below. (NB: This is for staff under Agenda for Change (AfC) and Medical and Den or M&D contract please refer to your line manager or HR manager to find o organisation.

Length of Service	Full Pay	Half Pay
During the first year	4 Months full pay (91 days)	2 Months half pay (91 days)

Leaving feedback and comments

If you found an article of use or if you feel something key is missing, you can leave a comment at the bottom of the article.

A. You may notice AAP deductions on your payslip if you have previously been incorrectly recorded as sick. If you have returned to work and have continued to receive AAP payments, then these may have been made in error if we have not been informed you that you had returned to work. Once your sickness record has been corrected, it may be that money already paid is no longer due to you and will need to be paid back.

Keywords: Sickness

Add a comment

* Comment

Article was very useful and saved me calling the helpdesk or raising a case, Thanks!

body

Post comment

These comments will be reviewed by NHS SBS. Please note you will not receive a response to any comment left on a knowledge article, so please do not ask questions.

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

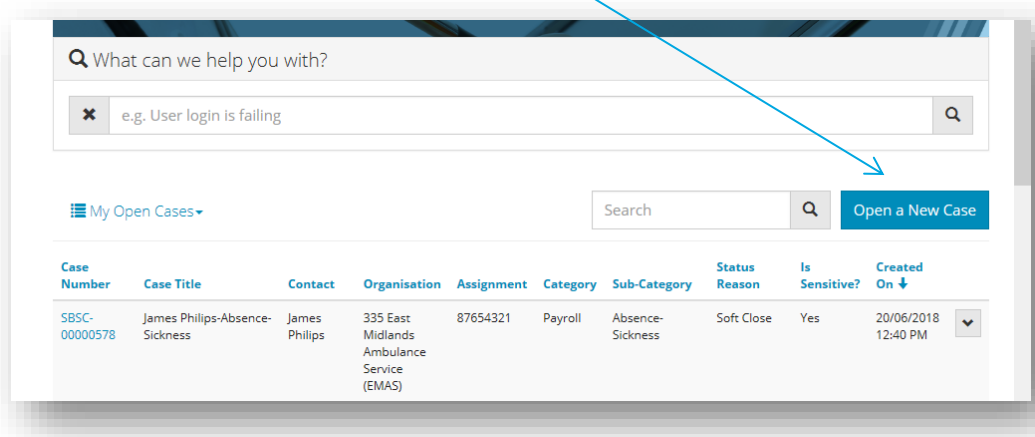
Using 'My Support' to log a case (for your own query)

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 visible on portal for employee? This is only applicable if an HR Manager is raising a case on behalf of an Employee, so leave as Yes.

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

Organisation & contact: will populate automatically.

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.

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 advise us of the key detail of your
Click on the drop-down arrow to choose to most applicable sub category.

The screenshot shows a form with the following fields and callouts:

- Raised By:** Helen Trainer
- Is visible on Portal for Employee:** Radio buttons for No and Yes (Yes is selected).
- Organisation & contact:** Callout pointing to 'Organisation *' (NHS Portsmouth CCG) and 'Contact *' (Helen Trainer).
- Assignment:** Callout pointing to the 'Assignment' search box.
- Availability Details:** Callout pointing to the 'Availability Details' dropdown menu.
- Category & Sub-Category 2:** Callouts pointing to the 'Category *' and 'Sub-Category 2 *' dropdown menus.

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 *

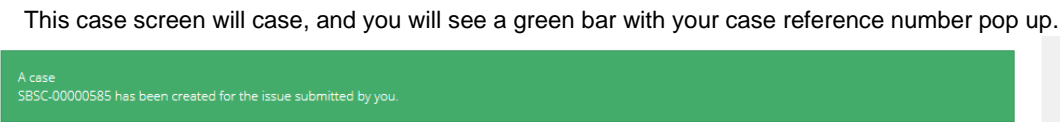
Description: Please add as much information about your query as possible to assist the NHS SBS team to resolve it. Please do not include any personal identifiable data such as NI number, bank details, salary, or sickness information.

Attach a file: If you wish to attach a document, you can do so here by browsing your device to add. Attachment size limit is 5MB.

Attach a file
 No file chosen

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

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



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

If you have the HR Manager role that means you can 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 be aware of this option:

Is Visible on Portal for Employee

No Yes

Is visible on portal for Employee If you do not want the employee to be aware of the case you have raised, you can select NO, this means you as the one raising the case can see it on the portal but not the Employee the case is about (the contact) – usually used for death in service.

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.

Lookup Records

To search on partial text, use the asterisk (*) wildcard character.

*Philips

Full Name	Organisation Name	Employee Number	Email	Additional Email	Personal Phone Number	Additional Phone	Owner	Created On
✓ Alice Simmonds	335 East Midlands Ambulance Service (EMAS)	12345604	Alice.Simmonds@email.com		01234567282		Pippa Haines	07/06/2017 2:06 PM
Ashley Wilmott	335 East Midlands Ambulance Service (EMAS)						Hayley Read	28/06/2017 2:32 PM
James Philips	335 East	87654322	James.Philips@email.com				Pippa	07/06/2017

Select
Cancel
Remove Value

Click on the correct employee, so the record goes blue and click the 'Select' button.

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

Organisation *
335 East Midlands Ambulance Service (EMAS) x Q

Contact *
James Philips x Q

Assignment
Q

Availability Details
v

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, sub category and sub category 2 and enter the case description. (Refer back to page 6)

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.

Helen Trainer-Tax Query-New Starter

Is visible on portal for employee?
This is only applicable if an HR Manager is raising a case on behalf of an Employee, so leave as Yes.

General

Case Number
SBSC-00331827

Organisation *
NHS Portsmouth CCG

Assignment
—

Category *
Payroll

Sub-Category 2 *
New Starter

Last Updated
11/06/2021 9:56 AM

Description *
Please can you advise why I am on a BR tax code? Thanks

Is Visible on Portal for Employee
 No Yes

Contact *
Helen Trainer

Availability Details
—

Sub-Category *
Tax Query

Raised By *
Helen Trainer

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 data, such as bank details or NI number. This is the info NHS SBS will use to resolve your query.

Timeline

11 days ago
Modified on 11/06/2021 9:56 AM

Created On
11/06/2021 9:55 AM

Helen Trainer → SYSTEM

Portal Attachment

Created by SYSTEM

Portal document.docx (11.52 KB)

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.

Portal attachments: If a document was attached when the case was created on the portal, it will show here.

Update
Resolve Case

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:

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

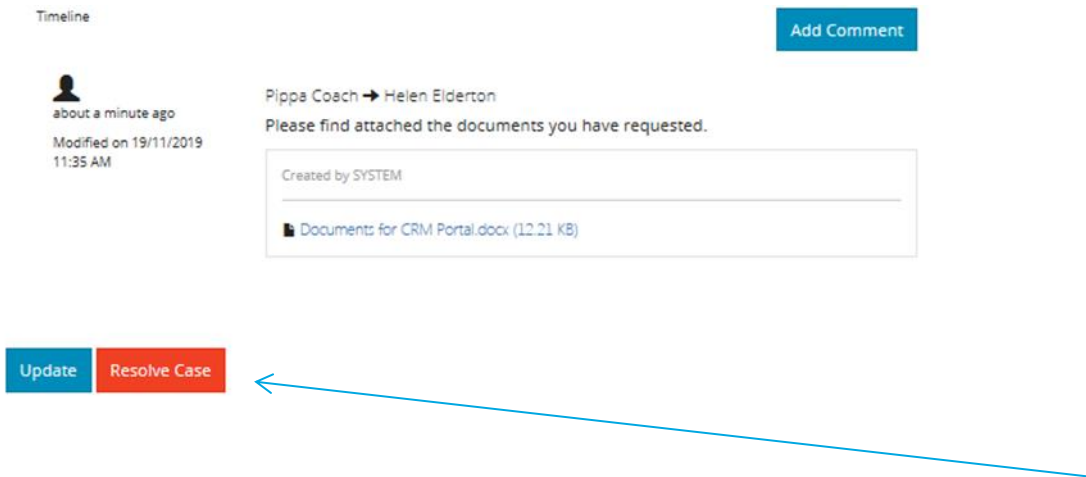
To update the case and save the new comment click on the blue '**Update**' button and this will send a notification to NHS SBS that you have amended a case.

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 case on behalf of an employee, they will receive an email notification that comments have been added unless you selected that they could not see the case on the portal.*

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.