

Portal User Guide (Employee/Flexible Worker)

This is a quick guide on how to access and navigate around the NHS SBS self-service portal.

Please note: Only registered users can access the portal.

All the Employee/Flexible Worker and case details in this document have been made up for training purposes.

How to register

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

You will need to enter:

- **your email address** (this is the email address that has been associated with the system used by the HR team, which is the same as your MyBank email.
- **your eight digit assignment / Employee/Flexible Worker number**

Type 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 can take up to five minutes to come through). If you receive an error message or your email address is not accepted, please contact our NHS Professionals Employee/Flexible Worker Service desk on 0333 240 7552.

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.

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

<https://nhssbs.microsoftcrmportals.com/SignIn?returnUrl=%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 a 'Sign in with a local account' section. It includes fields for Username and Password, a 'Remember me?' checkbox, and buttons for 'Sign in', 'Forgot your password?', and 'Forgot your username?'. Three callout boxes provide instructions: one for 'Forgot your password?' (asking for email for a reset), one for 'Forgot your username?' (asking for email for a username reminder), and one for the 'Sign in' button.

If you receive an error message or have any issues getting a password reset, please contact our NHS Professionals Employee/Flexible Worker Service desk on 0333 240 7552.

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

The screenshot shows the home page with navigation links for 'Knowledge Base' and 'My Support', a search bar, and a user profile for 'Helen Trainer'. Two callout boxes provide instructions: one for 'Knowledge Base' (accessing articles for general questions) and one for 'My Support' (logging new cases or viewing previous ones). A definition of a 'case' is also provided.

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**.

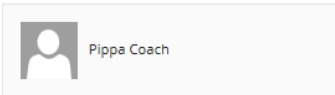
This will display your key profile information, most of this is populated from ESR, so cannot be amended but you can update your additional phone number and job title.

If you do make any changes, please click on the **'update'** button.

If 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.

HOME / PROFILE

Profile



Pippa Coach

- Profile
- Security
- Change Password

Your Information

First Name *	Last Name *
Pippa	Coach
Organisation Name	Employee Number
NHS Professionals Ltd	88887777
Email	Personal Phone Number
—	—
Additional Email	Additional Phone
Pippa@test.net	<input type="text"/>
Job Title	Payroll Frequency
<input type="text"/>	—

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

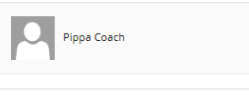
This will then ask you to add your old password, your new password and repeat the new password to ensure it's correct.

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.

HOME / PROFILE / CHANGE PASSWORD

Change Password



Pippa Coach

- Profile
- Security
- Change Password

Username	Pippa
* Old Password	<input type="password"/>
* New Password	<input type="password"/>
* Confirm Password	<input type="password"/>

[Change password](#)

Using the Knowledge base

If you have a general question about your pay or process, 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 query 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, dependant on length of service as shown on the table below. (NB: This is for staff under Agenda for Change (AfC) and Medical and Dental (M&D) contracts). If you are not on an AFC or M&D contract please refer to your line manager or HR manager to find out about any local sickness policy for your organisation.

Length of Service	Full Pay	Half Pay
During the first year of service	1 Months full pay (31 days)	2 Months half pay

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).

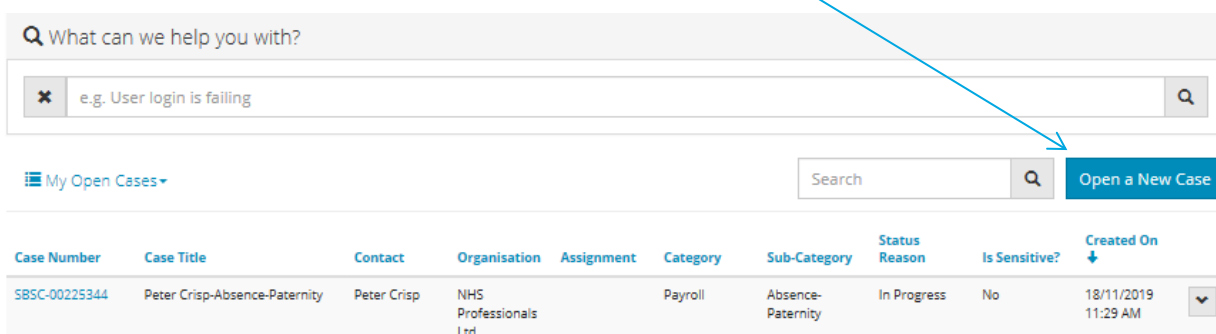
Using 'My Support' to log a case

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 Professionals payroll team to resolve your query.

Open a New Case

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.

Raised By: will show your name

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.

Sub-Category and 2: Please advise us of the key detail of your query. Click on the drop-down arrow to choose to most applicable sub category.

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

Description: Please add as much information about your query as possible to assist the NHS SBS team to resolve it. Please limit any personal identifiable data such as NI number, bank details, salary, or sickness information.

The form contains the following fields and elements:

- Raised By:** Helen Trainer
- Is visible on Portal for Employee:** Radio buttons for No and Yes (Yes is selected).
- Organisation:** NHS Portsmouth CCG
- Contact:** Helen Trainer
- Assignment:** Searchable text box with a magnifying glass icon.
- Category:** Drop-down menu.
- Sub-Category 2:** Drop-down menu.
- Availability Details:** Drop-down menu.
- Description:** Large text area with a warning: "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."
- Attach a file:** "Choose Files" button, "No file chosen", and a link to "GDPR Privacy Notice".
- Submit/Cancel:** Two buttons at the bottom.

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.

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

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



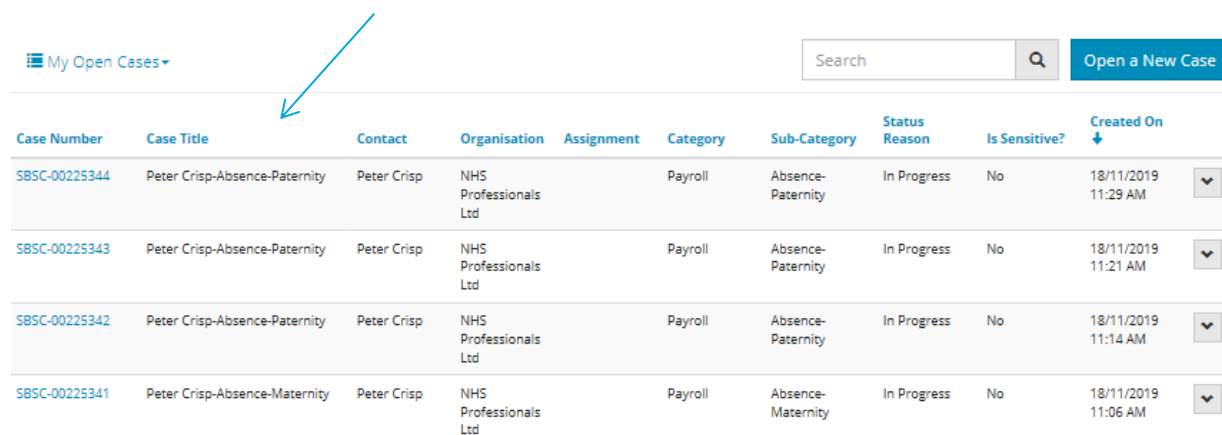
Using 'My Support' to track your cases

If you have raised a call through the Employee/Flexible Worker helpdesk or raised a case 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 (if nothing is displayed, you have not yet logged any cases with NHS SBS):

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-00225344	Peter Crisp-Absence-Paternity	Peter Crisp	NHS Professionals Ltd		Payroll	Absence-Paternity	In Progress	No	18/11/2019 11:29 AM
SBSC-00225343	Peter Crisp-Absence-Paternity	Peter Crisp	NHS Professionals Ltd		Payroll	Absence-Paternity	In Progress	No	18/11/2019 11:21 AM
SBSC-00225342	Peter Crisp-Absence-Paternity	Peter Crisp	NHS Professionals Ltd		Payroll	Absence-Paternity	In Progress	No	18/11/2019 11:14 AM
SBSC-00225341	Peter Crisp-Absence-Maternity	Peter Crisp	NHS Professionals Ltd		Payroll	Absence-Maternity	In Progress	No	18/11/2019 11:06 AM

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**)

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

Active - In Progress

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

Timeline

Helen Trainer

11 days ago

Modified on 11/06/2021 9:56 AM

Helen Trainer → SYSTEM

Portal Attachment

Created by SYSTEM

Portal document.docx (11.52 KB)

Created On
11/06/2021 9:55 AM

Update
Resolve Case

Add Comment

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.

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.

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.

Using 'My Support' to add comments, view comments and sending documents.

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:

The screenshot shows a window titled "Add a Comment" with a close button (X) in the top right corner. Inside the window, there is a text area labeled "* Comment". Below the text area is an "Attach a file" input field with a "Browse..." button. At the bottom of the window, there are two buttons: "Submit" and "Cancel".

The screenshot shows a "Choose File to Upload" dialog box. The dialog box has a search bar and a list of files. The file "Documents for CRM Portal.docx" is selected. The "File name" field shows "Documents for CRM Portal.docx" and the file type is "All Files (*.*)". The "Open" button is highlighted with a blue arrow. A text box on the right explains the process of selecting a file.

You can add additional information in the comments box and also attach documents by clicking on the 'Browse' button. A pop out window will be displayed to allow you to search for the relevant document.

Once you have found the required document, select the document and click on the 'Open' button. .

Add a Comment ✕

* Comment

Attach a file

Once you have added all of the information required, click on the 'Submit' button.

Any comments or documents 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

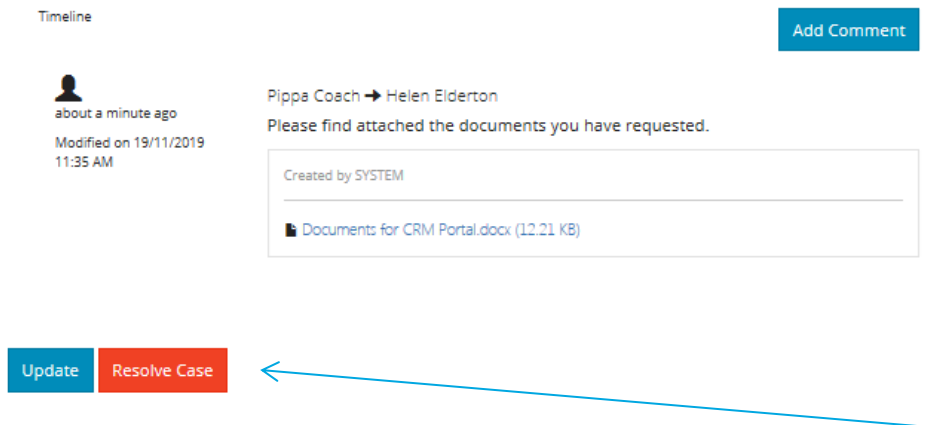
Documents for CRM Portal.docx (12.21 KB)

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

Please note the NHS Professionals payroll team can also add comments to the case, for you to view here on the portal and you will receive an email notification to the email address you use to log in with.

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 the case directly on the portal and therefore stop the NHS SBS team from working on it.



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