

Inputting PADR/Pay Progression Discussions into ESR

**GUIDANCE FOR MANAGERS/
REVIEWERS ON ESR SELF SERVICE**

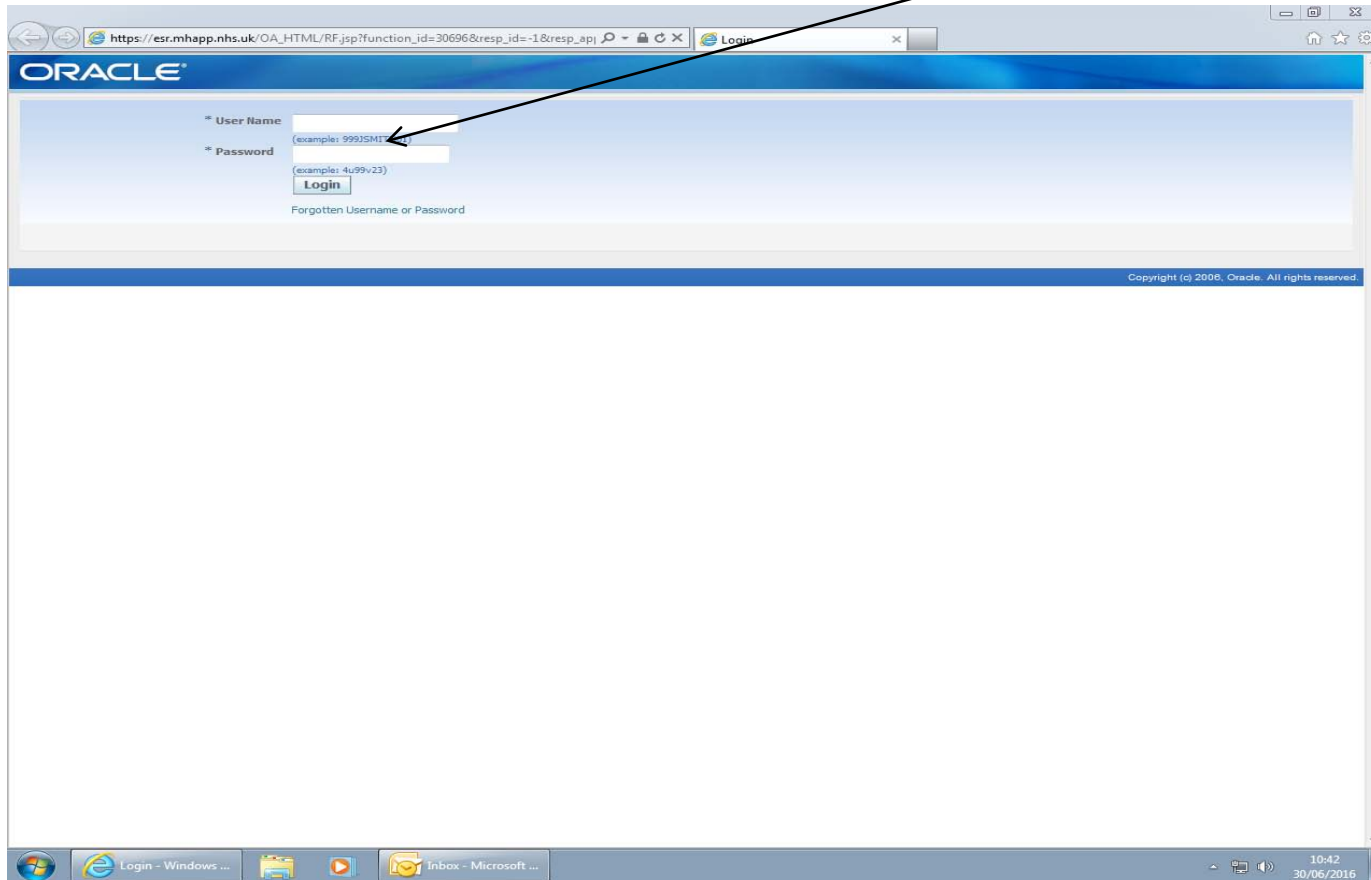


How do I know if I have ESR Self Service?

- All areas now have ESR Self Service except Medicine and some Exec areas.
- LED will only accept section 1 of the Pay Progression Booklet from Medicine and some Exec areas, everyone else needs to enter their staffs PADR's directly into ESR.




1. To start a PADR/ Pay Progression for a reviewee – log into ESR



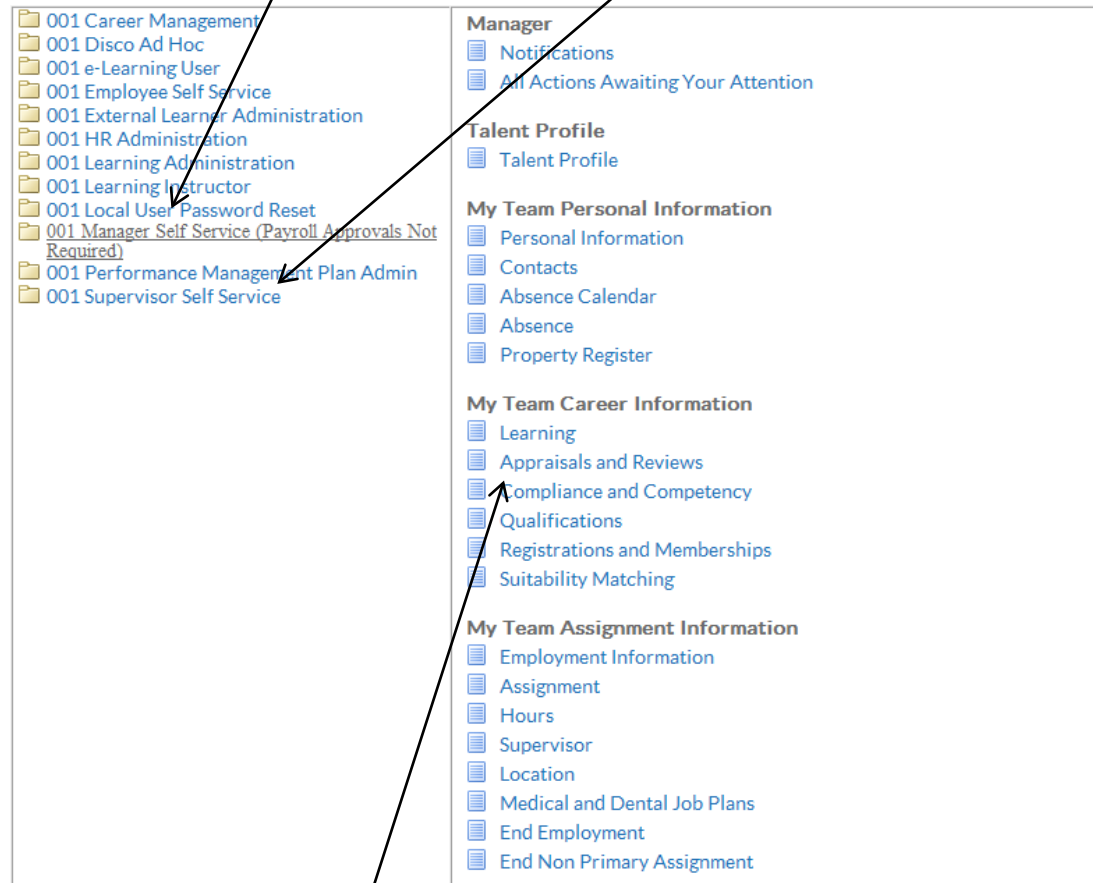
PLEASE NOTE: The reviewee can also start their own review and send onto you to complete.

2. Select either *Manager* or *Supervisor Self Service*

Oracle Applications Home Page

 **TIP** You have 13 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notificatio

Navigator



The screenshot shows the Oracle Applications Navigator menu. The left pane lists various self-service options, with '001 Manager Self Service (Payroll Approvals Not Required)' highlighted. The right pane shows the 'Manager' menu structure, with 'Appraisals and Reviews' highlighted under the 'My Team Career Information' section. Two black arrows originate from the top text: one points to the '001 Manager Self Service' item in the left pane, and the other points to the 'Appraisals and Reviews' item in the right pane.

- 001 Career Management
- 001 Disco Ad Hoc
- 001 e-Learning User
- 001 Employee Self Service
- 001 External Learner Administration
- 001 HR Administration
- 001 Learning Administration
- 001 Learning Instructor
- 001 Local User Password Reset
- 001 Manager Self Service (Payroll Approvals Not Required)
- 001 Performance Management Plan Admin
- 001 Supervisor Self Service

Manager

- Notifications
- All Actions Awaiting Your Attention

Talent Profile

- Talent Profile

My Team Personal Information

- Personal Information
- Contacts
- Absence Calendar
- Absence
- Property Register

My Team Career Information

- Learning
- Appraisals and Reviews
- Compliance and Competency
- Qualifications
- Registrations and Memberships
- Suitability Matching

My Team Assignment Information

- Employment Information
- Assignment
- Hours
- Supervisor
- Location
- Medical and Dental Job Plans
- End Employment
- End Non Primary Assignment

Then select '*Appraisals and Reviews*'

3. On this page you can view PADRs 'In Progress' and those you have 'Completed, you can also start a new PADR;

In Progress Completed Performance

Main Appraiser Reviewer and Participant

Appraisals and Reviews As Main Appraiser

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

[View Appraisals and Reviews in People Hierarchy](#)

Appraisals and Reviews In Progress

Create **Standard Appraisal** Go

[Select All](#) | [Select None](#)

Select	Initiator	Appraisee	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
<input type="checkbox"/>			28-Apr-2017	Planned	AFC Development Review		Open	14-Apr-2016	28-Apr-2017		<input type="text" value="Browse..."/>							
<input type="checkbox"/>			16-Nov-2016	Opening with Status	AFC Development Review		Open	13-Nov-2015	16-Nov-2016		<input type="text" value="Browse..."/>							
<input type="checkbox"/>			29-Sep-2016	Ongoing with Main Appraiser	Review		Open	18-Jun-2015	29-Sep-2016		<input type="text" value="Browse..."/>							
<input type="checkbox"/>			22-Jun-2016	Ongoing with Main Appraiser	Review		Open	01-Jun-2016	22-Jun-2016		<input type="text" value="Browse..."/>							

[View Appraisals and Reviews in People Hierarchy](#)

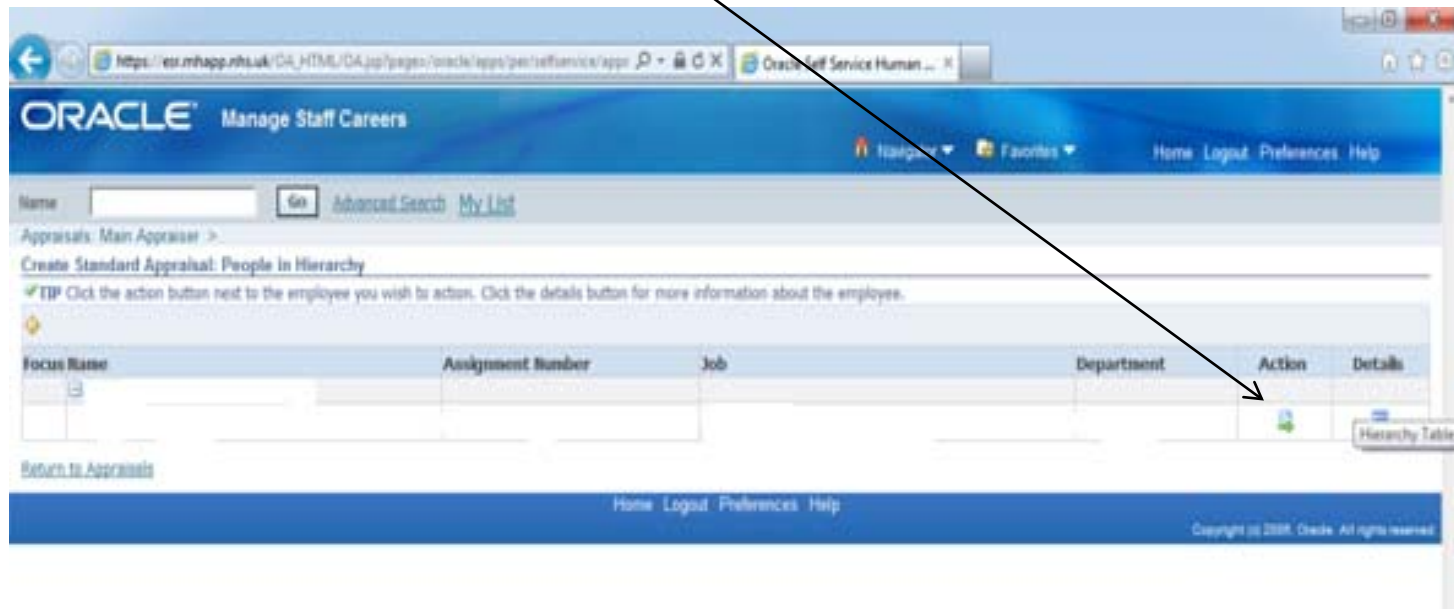
Home Logout Preferences Help

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Switch to Mobile

To start a new PADR, click Create 'Standard Appraisal, then Go

4. This page will bring through your hierarchy of staff, select the *Action* button – next to the appropriate reviewee’s name and a new screen will appear:



The screenshot displays the Oracle Manage Staff Careers web application. The browser address bar shows the URL: https://es.mhapp.nhs.uk/CA_HTML/CA.js/pages/oracle/apps/gen/selfservice/appr. The page title is "ORACLE Manage Staff Careers". The navigation bar includes "Home", "Logout", "Preferences", and "Help". Below the navigation bar, there is a search section with a "Name" input field, a "Go" button, and links for "Advanced Search" and "My List". The main content area is titled "Appraisals: Main Appraiser >" and "Create Standard Appraisal: People in Hierarchy". A tip states: "TIP Click the action button next to the employee you wish to action. Click the details button for more information about the employee." Below the tip is a table with the following columns: Focus Name, Assignment Number, Job, Department, Action, and Details. The table contains one row of data. An arrow points to the "Action" button in the table. A "Hierarchy Table" tooltip is visible near the bottom right of the table. At the bottom of the page, there is a footer with "Home Logout Preferences Help" and "Copyright © 2005, Oracle. All rights reserved."

5. Record the PADR details

Select *Review Type* as follows;

- AfC Development Review – if it is a PADR/ Pay Progression Review
- Review – if it is an annual PADR for staff at the top of the pay band or mid year PADR

Period Start Date;

- Is the date of the employees previous PADR

Period End Date;

- Is the date the current PADR is being undertaken

Template;

- Click on the magnifier glass and type in %, then click Go, use the following templates;
 - AfC Development review – if it is a PADR/ Pay Progression Review
 - KSF Review – if it is an annual PADR but not a Pay Progression discussion
- Click ‘select’

Appraisal Date;

- Is the date the PADR/ Pay Progression review is being undertaken

Next Appraisal Date;

- Date the next PADR will take place (this will need to be 8-12 weeks prior to the reviewees incremental date – if this date is entered, the system will generate reminders via the notifications)

Employee Name
Employee Number

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

Review Type AfC Development Review
Example: 26-Apr-2017

Period Start Date 11-May-2016

Period End Date 11-May-2017

Template AfC Development Review

Appraisal Date 11-May-2017

Next Appraisal Date 11-May-2018

Assignment Number 1

Main Reviewer []

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	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	31	1	2	3

Home Logout Preferences Help

Switch to Mobile

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6. Once completed, either click on the following;
- a. Save and Close – if it is a ‘Review’ PADR **OR**
 - b. Add Details – if it is a AfC Development Review - Pay Progression/ PADR (go to next page)

NHS My Team Career Information Home Logout Preferences Help

Create Standard Appraisal: Setup Details

Step 1 of 2

Employee Name _____
Employee Number 10007210

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

- * Review Type AfC Development Review
(example: 26-Apr-2017)
- * Period Start Date 11-May-2016
- * Period End Date 11-May-2017
- * Template AfC Development Review
- * Appraisal Date 11-May-2017
- Next Appraisal Date _____
- Assignment Number _____
- * Main Reviewer _____

May 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	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	31	1	2	3

Cancel Save and Close Add Details

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Switch to Mobile

6b cont... Recording the Outcome of the AfC Development Review - Pay Progression/ PADR

- As a minimum you **MUST** complete the AfC Pay Progression section to confirm whether the pay increment is to be awarded or not, therefore you need to either select 1 – Yes or 2 – No (please do **not** use option 3), then you **MUST** add some comments to justify your decision.
- IMPORTANT – if you select 2 ‘No’ this links directly to Payroll and the pay increment will automatically be stopped. The pay increment cannot be awarded until the following year.*
- Click ‘Save and Close’, this will take you back to the reviews in progress list

Click Add Person Competencies to view those competencies attached to the position. Select Add Competencies to add additional competencies against which to measure performance and record your evaluation. Click Delete removes the competency from this review only.

[Add Person Competencies](#) [Add Competencies](#)

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Delete
No results found.				

Learning Path

Add training activities to the reviewer's Personal Training Plan

Courses

[Add Courses](#)

Course	Component Status	Completion Date	Update	Delete
No results found.				

Questionnaire

Click Complete Questionnaire to respond to the questionnaire listed below. Last Answered tells you when you last answered the questionnaire.

Questionnaire Name: **KSF Review** Last Answered On: [Complete Questionnaire](#)

AfC Pay Progression

Overall Rating:

Overall Comments:

1-Yes
2-No
3-Yes following initial deferral

Participants

TIP: A participant is someone other than the main appraiser or appraisee who contributes to the appraisal

[Add Participant](#)

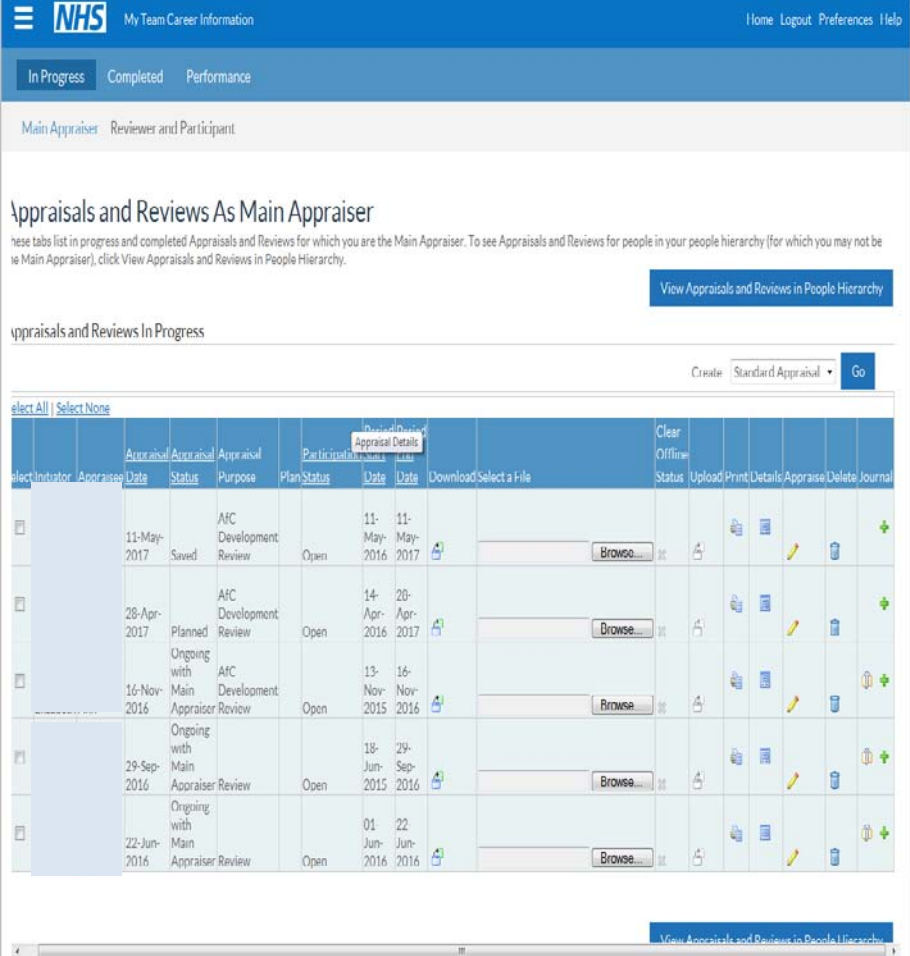
Full Name	Participation Type	Questionnaire Name	Update	Delete
No results found.				

[Save and Close](#) [Back](#) [Save and Proceed](#)

7. Attaching the PADR/ Pay Progression Recording Documentation Booklet (record of the discussion)

At this point you need to upload the paper version of the PADR/PP Recording Documentation Booklet.

To do this click on the 'journal' icon  next to the relevant reviewees PADR



The screenshot shows the NHS My Team Career Information interface. The main heading is 'Appraisals and Reviews As Main Appraiser'. Below this, there is a table of appraisal records. The table has the following columns: Initiator, Appraisal Date, Status, Purpose, Plan Status, and Dates (Start and End). Each row represents an appraisal record. In the bottom right corner of each row, there is a 'Journal' icon, which is a small green square with a white plus sign. This icon is highlighted in the text on the left. The table contains five rows of data, each with a 'Browse...' button and a 'Journal' icon. The 'Journal' icon is the one referred to in the text as the 'journal' icon.

Initiator	Appraisal Date	Status	Purpose	Plan Status	Start Date	End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
	11-May-2017	Saved	AFC Development Review	Open	11-May-2016	11-May-2017		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
	28-Apr-2017	Planned	AFC Development Review	Open	14-Apr-2016	20-Apr-2017		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
	16-Nov-2016	Ongoing with Main Appraiser	AFC Development Review	Open	13-Nov-2015	16-Nov-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
	29-Sep-2016	Ongoing with Main Appraiser	Main Appraiser Review	Open	18-Jun-2015	29-Sep-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
	22-Jun-2016	Ongoing with Main Appraiser	Main Appraiser Review	Open	01-Jun-2016	22-Jun-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						

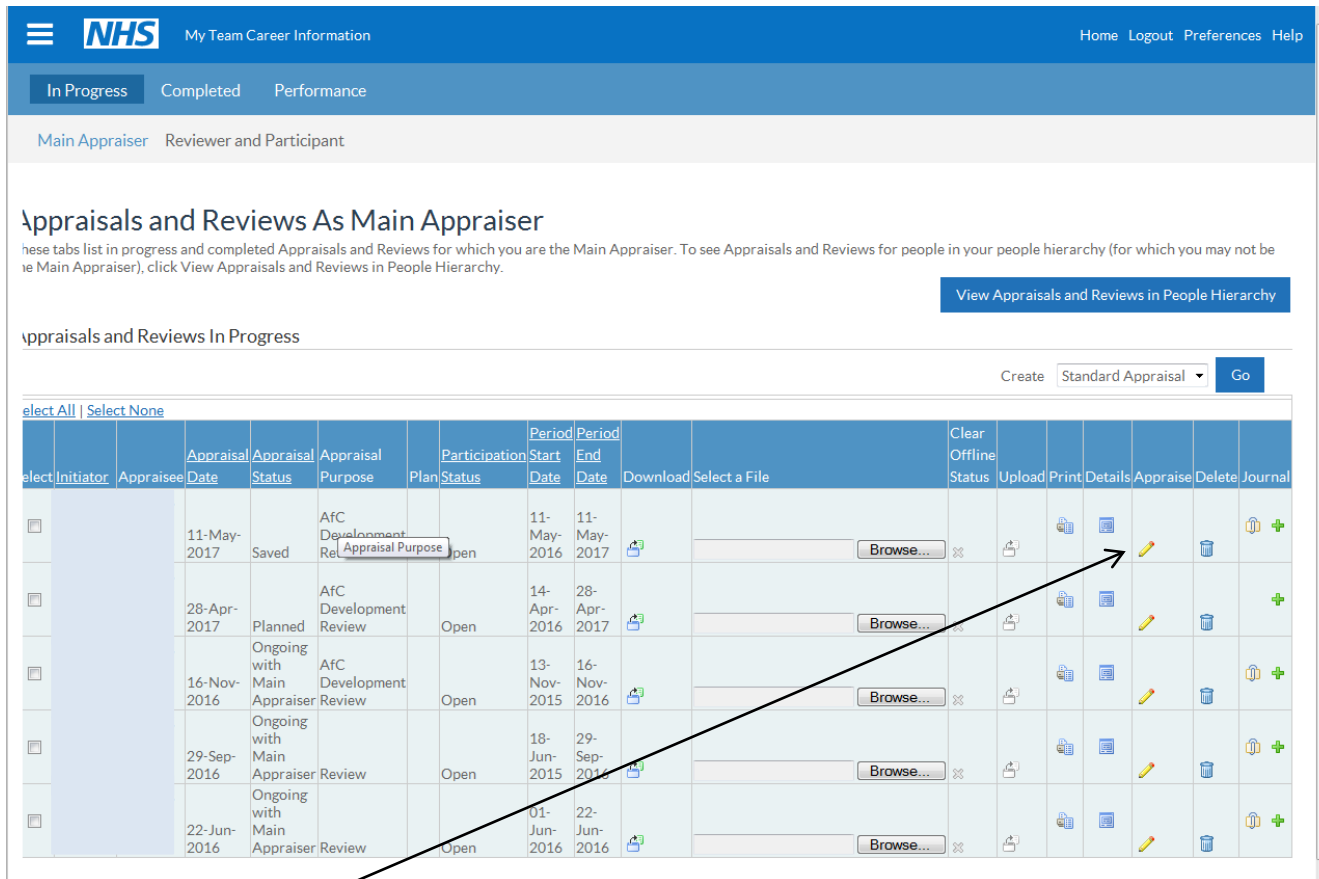
8. Find the PADR/ Pay Progression Recoding Documentation Booklet, by searching your folders/ files via *Browse*, click *Open*, then *Apply*

The screenshot shows the 'Add Attachment' form in a web application. The form has two main sections: 'Attachment Summary Information' and 'Define Attachment'. In the 'Define Attachment' section, the 'Type' is set to 'File' and a 'Browse...' button is visible. A 'Choose File to Upload' dialog box is open, showing the contents of the 'Local Disk (C:)' with a table of folders and files. The 'File name' field is empty, and the file type is set to 'All Files (*.*)'. The 'Open' button is highlighted. Arrows from the text above point to the 'Browse...' button, the 'Open' button in the dialog, and the 'Apply' button in the form.

Name	Date modified	Type
CAVUtils	23/11/2014 08:19	File folde
ClinWS	01/02/2016 11:04	File folde
com	06/01/2014 11:41	File folde
Domain	01/02/2016 10:57	File folde
EUWORKSTATION	06/01/2014 11:41	File folde
Generic Letters	06/01/2014 11:41	File folde
HP Universal Print Driver	06/01/2014 09:43	File folde
Intel	11/02/2016 08:52	File folde
O53302	01/02/2016 11:00	File folde
OLD PC	01/02/2016 10:59	File folde

If you would like to add evidence or further documentation, please use 'Add Another'

9. You will see the document has been attached when the paperclip icon appears  next to the journal icon



The screenshot shows the NHS My Team Career Information interface. The main heading is "Appraisals and Reviews As Main Appraiser". Below this, there is a table titled "Appraisals and Reviews In Progress". The table has columns for Initiator, Appraiser, Appraisal Date, Appraisal Status, Appraisal Purpose, Plan Status, Participation Status, Period Start Date, Period End Date, Download, Select a File, Clear Offline Status, Upload, Print, Details, Appraise, Delete, and Journal. A tooltip "Appraisal Purpose" is visible over the "AFC Development Review" row. A pencil icon in the "Appraise" column of the first row is highlighted with a black arrow.

Select	Initiator	Appraiser	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan Status	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete	Journal
<input type="checkbox"/>			11-May-2017	Saved	AFC Development Review	Open	Open	11-May-2016	11-May-2017		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
<input type="checkbox"/>			28-Apr-2017	Planned	AFC Development Review	Open	Open	14-Apr-2016	28-Apr-2017		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
<input type="checkbox"/>			16-Nov-2016	Ongoing with Main Appraiser	AFC Development Review	Open	Open	13-Nov-2015	16-Nov-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
<input type="checkbox"/>			29-Sep-2016	Ongoing with Main Appraiser	Review	Open	Open	18-Jun-2015	29-Sep-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						
<input type="checkbox"/>			22-Jun-2016	Ongoing with Main Appraiser	Review	Open	Open	01-Jun-2016	22-Jun-2016		<input type="text" value="Browse..."/>	<input type="checkbox"/>						

If you would like to make any changes or to **complete the PADR**, click on the pencil icon 'Appraise', which will take you back in to the review

10. Completing the PADR/ Pay Progression Review



NHS My Team Career Information Home Logout Preferences Help

Update Standard Appraisal: Overview

Step 2 of 2

Employee Name
Employee Number
Supervisor

Organisation
Job **Administrative and Clerical Officer**

[Save and Close](#) [Back](#) [Save and Proceed](#)

Objectives

[Add Objective](#) [Find Objectives](#)

Objective Name	Start Date	Target Date	Achievement Date	Update Details	Delete	Duplicate	Quick Update
No results found.							

Competencies

[KSF Document](#) [e-KSF website](#)

Click Add Person Competencies to view those competencies attached to the position. Select Add Competencies to add additional competencies against which to measure performance and record your evaluation. Click Delete removes the competency from this review only.

[Add Person Competencies](#) [Add Competencies](#)

Competency	Current Proficiency Level	Proficiency Rating	Update Details	Competencies	Delete
No results found.					

Setup Details

* Indicates required field

Initiator		Appraisal Date	11-May-2017
* Appraisal Purpose	AfC Development Review	Next Appraisal Date	11-May-2018
* Period Start Date	11-May-2016	Assignment Number	
* Period End Date	11-May-2017		
* Template	AfC Development Review		
* Main Appraiser			

Learning Path

Add training activities to the reviewer's Personal Training Plan

Courses

[Add Courses](#)

Once you have clicked on the pencil icon to go back into the review, this will enable you to make any further changes – to complete the PADR, click ‘Save and Proceed’

11. To complete the PADR

Confirmation
Your changes have been saved. You are now required to complete the appraisal.

Share With Appraisee Update Appraisal Complete Appraisal

Employee Name: [Redacted]
Employee Number: [Redacted]
Job: Administrative and Clerical|Officer

Organisation: [Redacted]
Organization Email Address: [Redacted]
Supervisor: [Redacted]

Setup Details

Initiator: [Redacted]
Appraisal Purpose: AfC Development Review
Period Start Date: 11-May-2016
Period End Date: 11-May-2017
Template: [Redacted]

Main Appraiser: [Redacted]
Appraisal Date: 11-May-2017
Next Appraisal Date: 11-May-2018

AfC Pay Progression

Overall Rating: 1-Yes
Overall Comments: [Redacted]
Appraisee Feedback: [Redacted]

Manage Participants

Add Participant

Select	Full Name	Participation Type	Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	Delete
No results found.									

Competencies

Details	Competency	Current Proficiency Level	Appraisee Proficiency Rating	Main Appraiser Proficiency Rating
No results found.				

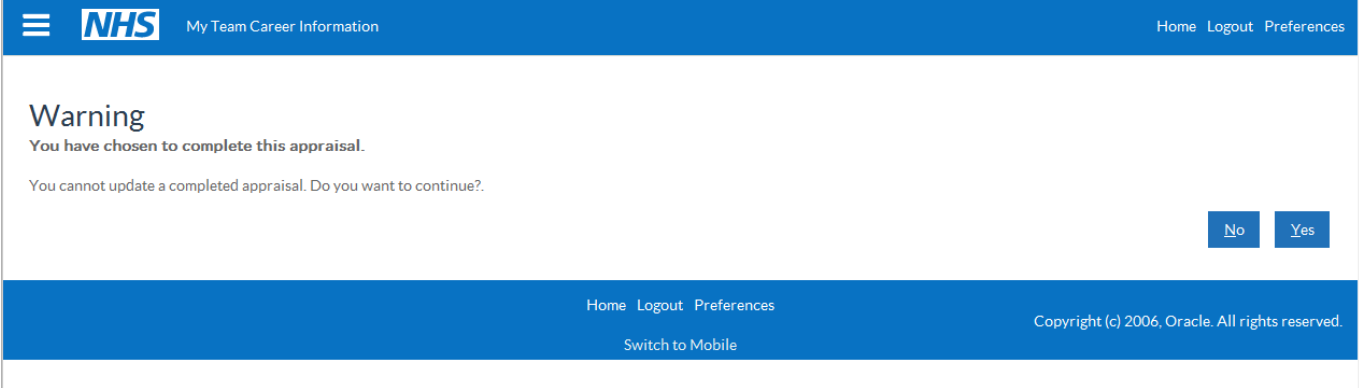
Objectives

Details	Objective Name	Start Date	Target Date	Achievement Date
No results found.				

Questionnaire Details: Appraisee

This page will provide you with a summary of the information you have entered – to complete the PADR, click ‘Complete Appraisal’, then on the next page click ‘Continue, on the final page click ‘Submit’

12. Final Completion



The screenshot shows a web application interface with a blue header and footer. The header contains the NHS logo, the text "My Team Career Information", and navigation links "Home", "Logout", and "Preferences". The main content area displays a "Warning" message: "You have chosen to complete this appraisal. You cannot update a completed appraisal. Do you want to continue?". Below the message are two buttons: "No" and "Yes". The footer contains the same navigation links as the header, a "Switch to Mobile" link, and a copyright notice: "Copyright (c) 2006. Oracle. All rights reserved."

Once you have submitted the review, a Warning message will appear informing you are completing the review, therefore no changes will be made following this stage – please click ‘Yes’

13. The completed PADR will show in the completed section.

NHS My Team Career Information Home Logout Preferences Help

In Progress **Completed** Performance

Main Appraiser Reviewer and Participant

Appraisals and Reviews As Main Appraiser

Confirmation
The appraisal is complete.

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

[View Appraisals and Reviews in People Hierarchy](#)

Current Workers **Terminated Workers**

Completed Appraisals and Reviews

Filter the list of completed appraisals using any combination of Appraiser, Appraisal Date, and Appraisal Purpose.

Appraiser: Last Name, Title, First Name

Appraisal Date: (example: 26-Apr-2017)

Appraisal Purpose:

[Go](#) [Clear](#)

Appraiser	Appraisal Date	Appraisal Purpose	Plan	Period Start Date	Period End Date	Details	Print	Delete	Journal
	11-May-2017	AfC Development Review		11-May-2016	11-May-2017				
	22-Jun-2016	AfC Development Review		01-Jun-2016	21-Jun-2016				
	04-Feb-2015	Review		06-Jan-2014	09-Jan-2015				
	07-May-2014	Review		06-May-2013	06-May-2014				

[View Appraisals and Reviews in People Hierarchy](#)

Home Logout Preferences Help

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