

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

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

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

Registration Request

General

Employee Number ?

Email ?

RMKRShH

[Generate a new image](#)

[Play the audio code](#)

 Enter the code from the image

You will need to enter:

- your eight-digit assignment / employee number (this can be found on your payslip)
- 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)

Click on the blue question mark symbols for more info:

Please use the email address held on your NHS Employment Record. This is usually an nhs.uk or nhs.net email address. Your HR department can amend this in the Office Details tab on ESR.

Email ? *

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


If your details are not recognised, you will receive a red error at the top of the screen


HOME / REGISTRATION REQUEST

Your details could not be found. Please check you have entered your Employee number correctly, details can be found on your payslip. Please enter the same email address that is held in ESR. If you tried again and require more support, please click [HERE](#)

Registration Request

General

Employee Number  *

Email  *

If you have entered the correct details and still receive an error, please click [HERE](#) and this will allow you to log a request for support with the registration error.

Once registered, you will then receive an email with a link to the portal (please note, this can take up to five minutes to come through).

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

This link will take you to the following screen:

Sign up with an invitation code

* Invitation Code

I have an existing account

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.

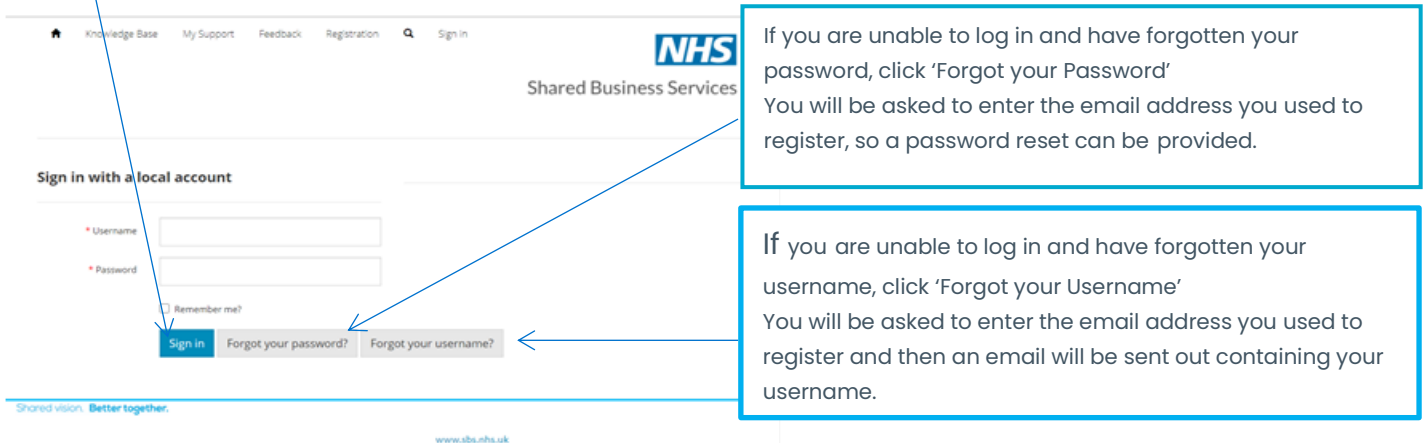
Once you submit these details, your account will be created.

How to Sign in

Once you are registered and have created your username & password, you can sign into the portal from any PC, laptop, tablet, or smartphone using this link: [Home · Customer Self-Service \(microsoftcrmportal.com\)](https://microsoftcrmportal.com)

(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 NHS Shared Business Services sign-in page. At the top, there is a navigation bar with links for Knowledge Base, My Support, Feedback, Registration, and Sign in. The NHS logo and 'Shared Business Services' text are prominently displayed. Below this, the sign-in section is titled 'Sign in with a local account'. It features input fields for Username and Password, a 'Remember me?' checkbox, and three buttons: 'Sign in', 'Forgot your password?', and 'Forgot your username?'. Three callout boxes provide instructions: one points to the 'Sign in' button, another to 'Forgot your password?' (explaining that it leads to an email-based password reset), and a third to 'Forgot your username?' (explaining that it leads to an email-based username recovery).

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



The screenshot shows the NHS Shared Business Services home page. The navigation bar includes 'Knowledge Base', 'My Support', a search icon, and a user profile 'Helen Trainer'. The NHS logo and 'Shared Business Services' text are at the top. Two callout boxes are present: one points to the 'Knowledge Base' link, explaining that it provides answers to general questions; the other points to the 'My Support' link, explaining that it is used for logging new cases or viewing previously logged cases.

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.

The image shows two screenshots of a web application interface. The top screenshot is the 'Profile' page for a user named Pippa Coach. It features a navigation menu on the left with 'Profile' and 'Security' (containing a 'Change Password' link). The main content area is titled 'Your Information' and contains a table of personal details: First Name (Pippa), Last Name (Coach), Organisation Name (NHS Professionals Ltd), Employee Number (88887777), Email (Pippa@test.net), and Additional Phone (empty field). A blue arrow points from the 'Change Password' link in the left menu to a text box. The bottom screenshot is the 'Change Password' page, which has a breadcrumb trail 'HOME / PROFILE / CHANGE PASSWORD'. It shows the user's profile information on the left and a form on the right with fields for Username (Pippa), Old Password, New Password, and Confirm Password, along with a 'Change password' button. A blue arrow points from the 'Change Password' button in the left menu of the top screenshot to the 'Change password' button in the bottom screenshot.

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	

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

Username Pippa

* Old Password

* New Password

* Confirm 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

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.

Most Popular

Most Popular Articles

Sickness

Print

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.

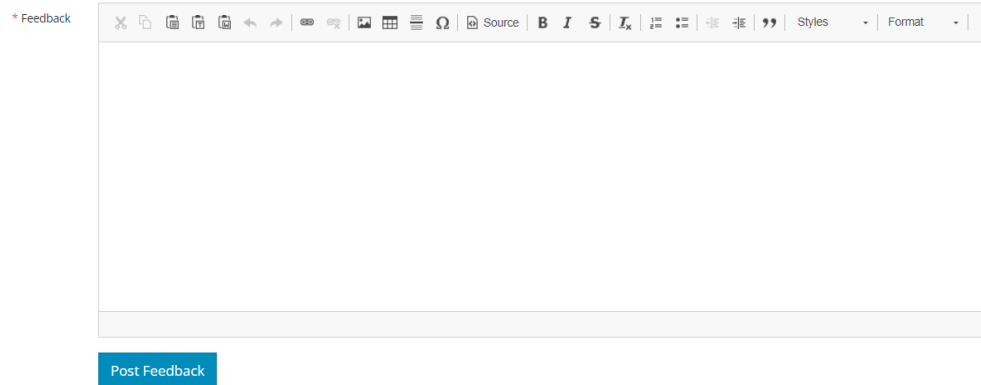
Length of Service	Full Pay	Half Pay
During the first year of service	1 Months full pay (31 days)	2 Months half pay
During the second	2 Months full pay (61 days)	2 Months half pay

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).

Leaving feedback

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

Feedback (Add feedback on how useful this Knowledge Article is)



The screenshot shows a feedback form interface. At the top left, there is a red asterisk followed by the word "Feedback". To the right of this is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment, and other editing functions. Below the toolbar is a large, empty text input area. At the bottom of the form, there is a blue button labeled "Post Feedback".

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

If you do not find the answer you are looking for in the articles, 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.

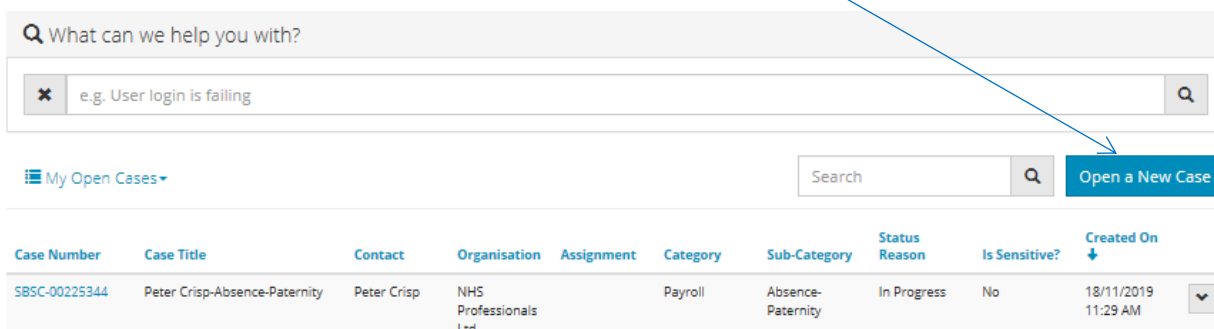
Using 'My Support' to log a case (for your own query)

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 team to resolve your query.

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 the section on logging a case on behalf of an employee, as it details the different information that is required.

Once you click to open a new case, you will need to provide some details:

Assignment: this will auto populate unless you have more than one assignment number with this NHS organisation – if so, click on the Magnifying glass, it will show all your assignment number(s), please select the applicable one.

Organisation & contact: will populate automatically.

Availability: Use the dropdown arrow to pick if you are only available for a call back at specific times. Click on the Question mark for more information

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

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

Additional Information: If NHS Shared Business Services are required to call you, we will endeavour to call within the time frame specified in this field. Please note this would only be in exceptional circumstances. You will receive an email to the email address populated in 'Additional Email' on the 'Profile' page when updates are available to view via the Portal.

Depending on what you select as the sub-category, the system will check to see if there is an applicable knowledge article available that may answer the query and if so, it will display a link to it under suggested topic.

The system will also check to see if you already have a case open under these categories and is so it will display a link to the previous case, so you can add extra

information rather than creating a new duplicate case. If there is no previous case open, please continue to complete the description field:

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 limit any personal identifiable data such as NI number, bank details, salary, or sickness information.

Attach a file
 No file chosen

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

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).

This case screen will case, 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 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

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

Select Cancel Remove Value

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

The screenshot shows a form with four main fields: 'Contact *', 'Assignment', 'Availability Details', and 'Category *'. Each field has a search icon (magnifying glass) on the right side. The 'Contact *' field is highlighted with a blue border, and an arrow points from the text box above to it. The 'Assignment' field also has a search icon, and an arrow points from the text box below to it.

Assignment: The assignment number should auto populate, unless this employee has more than one assignment number with this NHS organisation. If so, 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

You can then select the correct category, sub category and sub category 2 and enter the case description. *(Refer back to logging a case for your own query).*

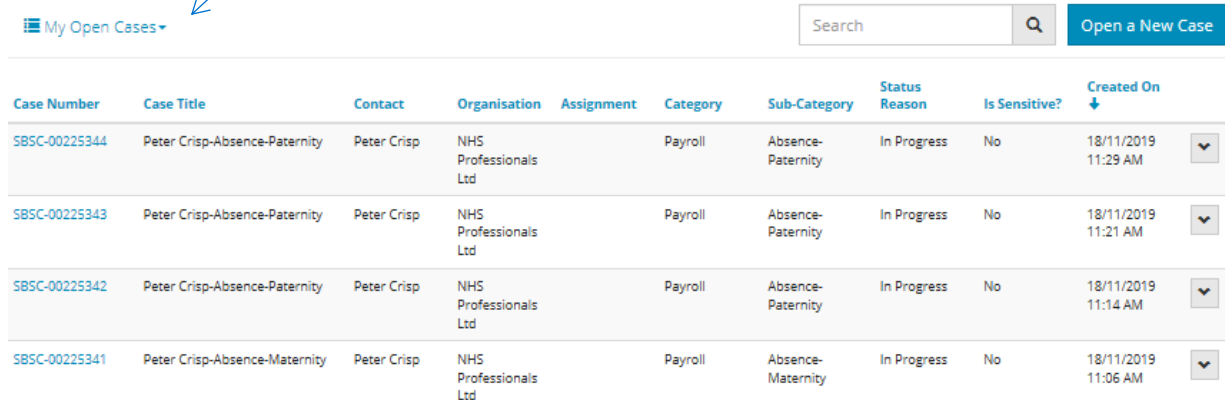
Using 'My Support' to track your cases

If you have raised any queries 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 (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.



My Open Cases ▾

Search

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? This is only applicable if an HR Manager is raising a case on behalf of an Employee.

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
- The category
- sub category
- Sub category 2
- When the case was created
- When last updated

Raised By; This will show your name for any cases you raised for yourself or members of your team.

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

Helen Trainer → SYSTEM

Portal Attachment

Created by SYSTEM

Portal document.docx (11.52 KB)

Add Comment

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.

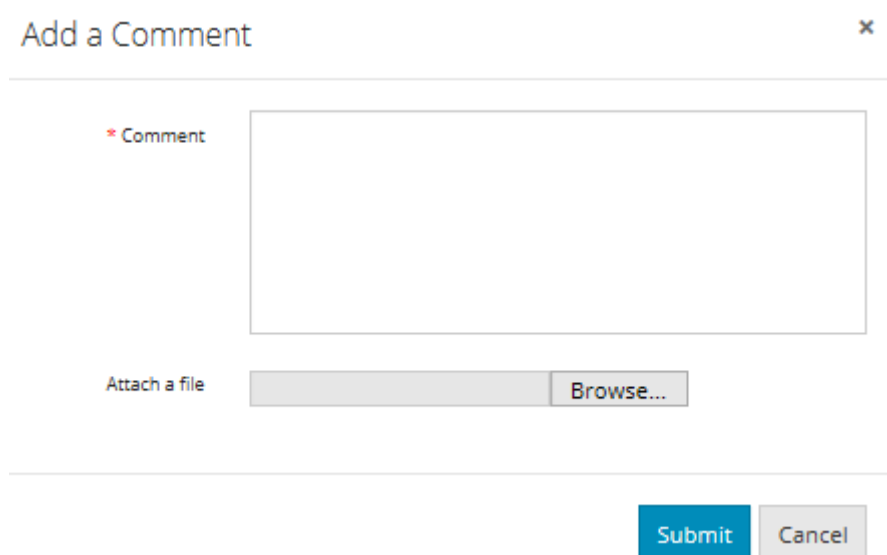
Portal attachments: If a document was attached when the case was created on the portal, it will show here.

Update

Resolve Case

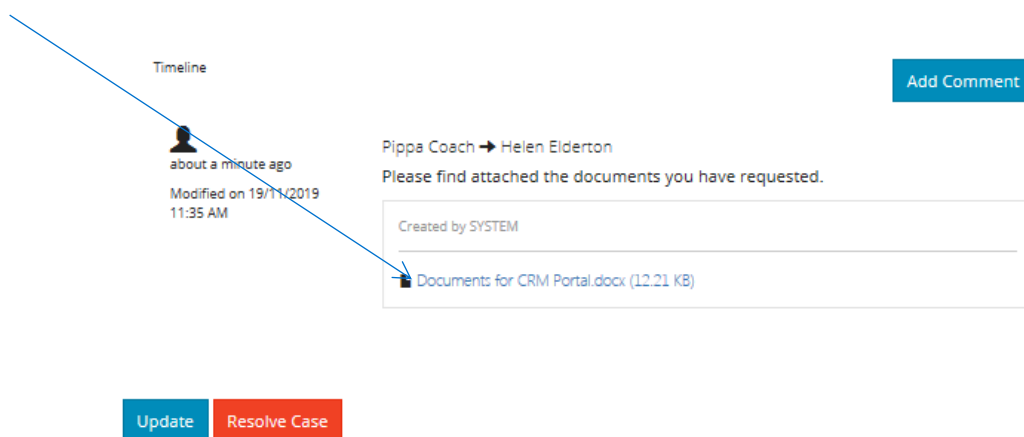
Using 'My Support' to add comments, view comments and sending documents.

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 modal window titled "Add a Comment" with a close button (X) in the top right corner. Inside the modal, there is a text area labeled "Comment" with a red asterisk icon to its left. Below the text area is a file upload section labeled "Attach a file" with a "Browse..." button. At the bottom of the modal are two buttons: "Submit" (blue) and "Cancel" (grey).

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



The screenshot shows a case timeline. On the left, a timeline entry shows a user icon, the text "about a minute ago", and "Modified on 19/11/2019 11:35 AM". A blue arrow points from this entry to a comment box on the right. The comment box is titled "Pippa Coach → Helen Elderton" and contains the text "Please find attached the documents you have requested." Below the text is a box showing "Created by SYSTEM" and a document icon with the filename "Documents for CRM Portal.docx (12.21 KB)". To the right of the comment box is a blue "Add Comment" button. At the bottom of the case view are two buttons: "Update" (blue) and "Resolve Case" (red).

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

Please note the NHS SBS 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.

The screenshot displays a case timeline interface. At the top left, the word "Timeline" is visible. To the right, there is a blue button labeled "Add Comment". Below this, a user profile icon is shown next to the text "about a minute ago" and "Modified on 19/11/2019 11:35 AM". The main content of the timeline entry is a message from "Pippa Coach" to "Helen Elderton" that says "Please find attached the documents you have requested." Below the message, it indicates "Created by SYSTEM" and shows an attached document icon with the filename "Documents for CRM Portal.docx (12.21 KB)". At the bottom of the interface, there are two buttons: a blue "Update" button and a red "Resolve Case" button. A blue arrow points from the right side of the image towards the "Resolve Case" button.

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