EMPLOYEE SELF SERVICEPORTAL
USER MANUAL

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Prepared for:

YEAR: 2024

Contents

USER GUIDE

ESS portal contains activities that an employee can self – subscribe to. An employee mustlogin to access the available activities.

FIRST TIME SIGN IN
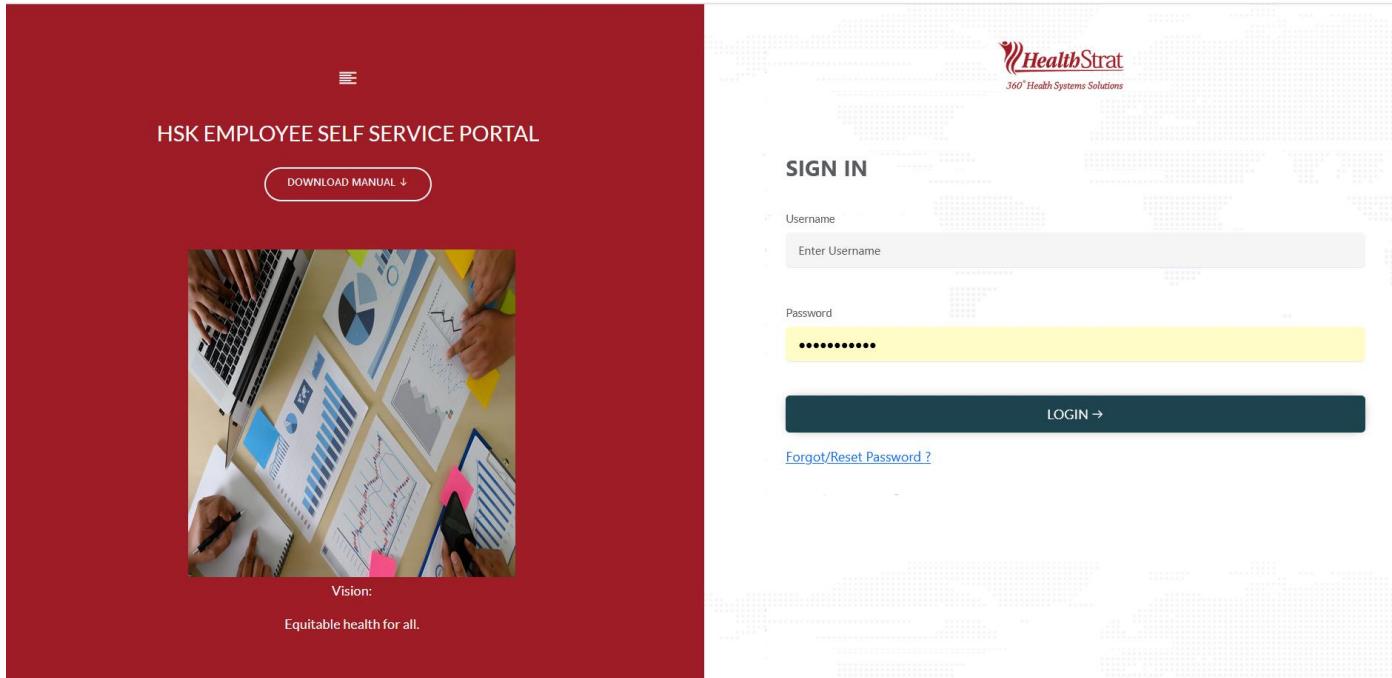
Fig 1: Login Page

The ESS portal can be accessed using the link: https://ess.healthstrat.co.ke

    I.   Upon accessing the link, one is prompted to log in.

    II.   For first-time users who have not accessed the ESS Portal before:

    III.   Click on Forgot/Reset password.

    IV.   then enter your user ID/Username e.g. (*HSK\JDOE*) and submit.

    V.   You will get an email with an OTP used to set your password.

NOTE: The default Username will be derived from your previous login credentials.

LOGIN PROCESS AND HOMEPAGE

To login, enter Username and Password then click Login.

Upon successful login, you will see a homepage which consists of a dashboard and amenu bar. The menu shows all the services in the portal, that is:

Human resource
Finance
Procurement
Transport
Performance Management
Reports
Approvals

A summary of your profile will also be displayed on the dashboard as shown in
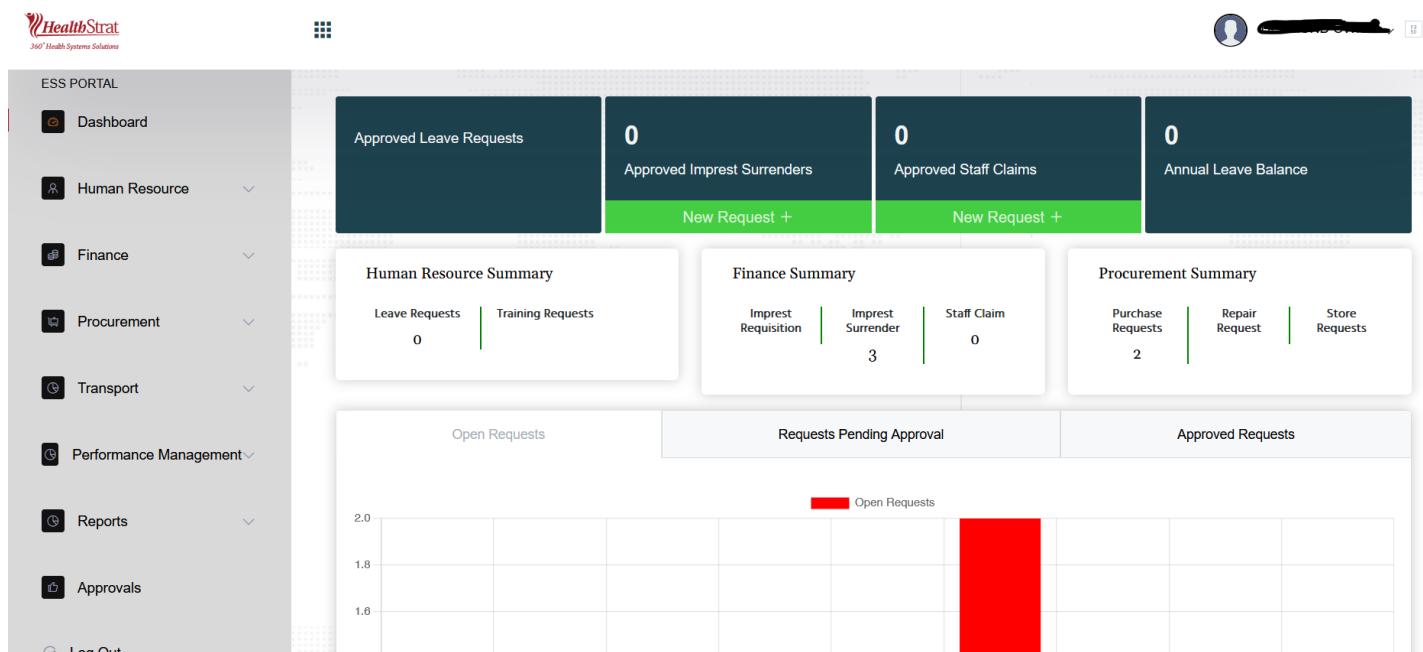
Fig 2: Dashboard

NAVIGATION

The Side menu Can be opened by hovering the mouse and clicking individual modules to open for more options.
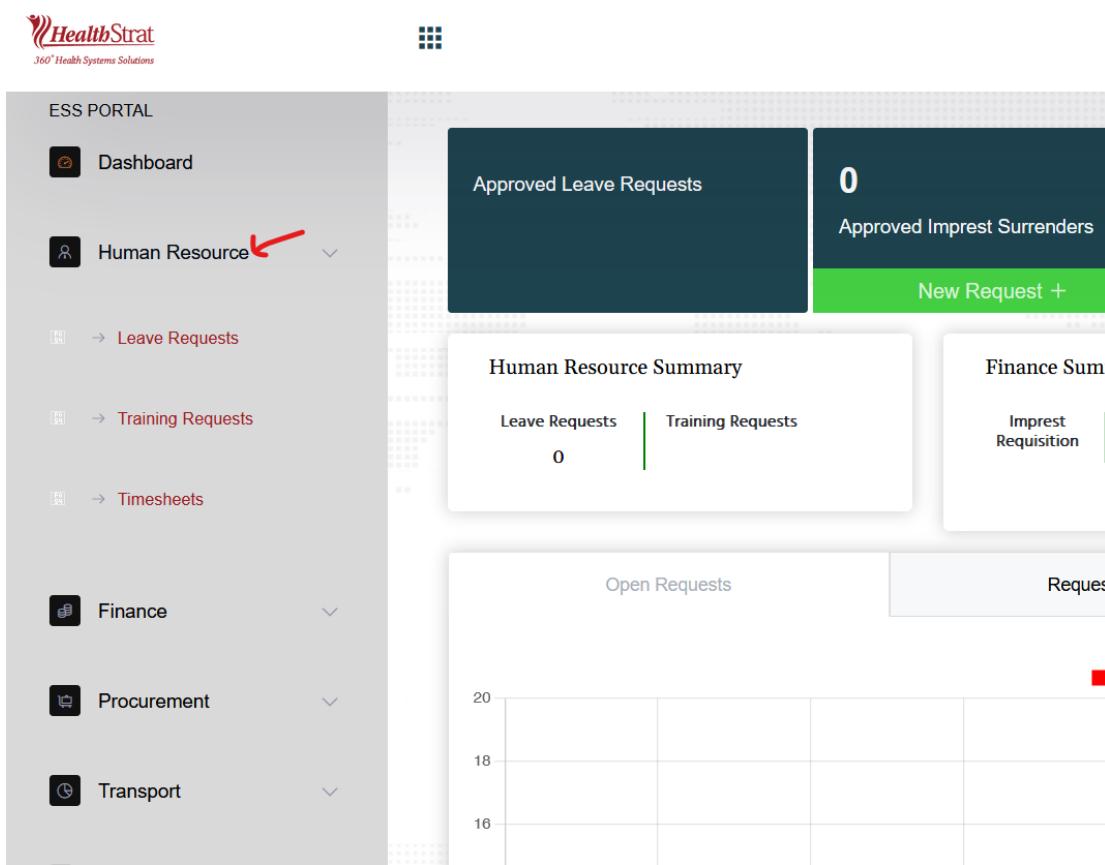
Fig 3: Side Menu

Each module opens to a different page as shown in the below image.
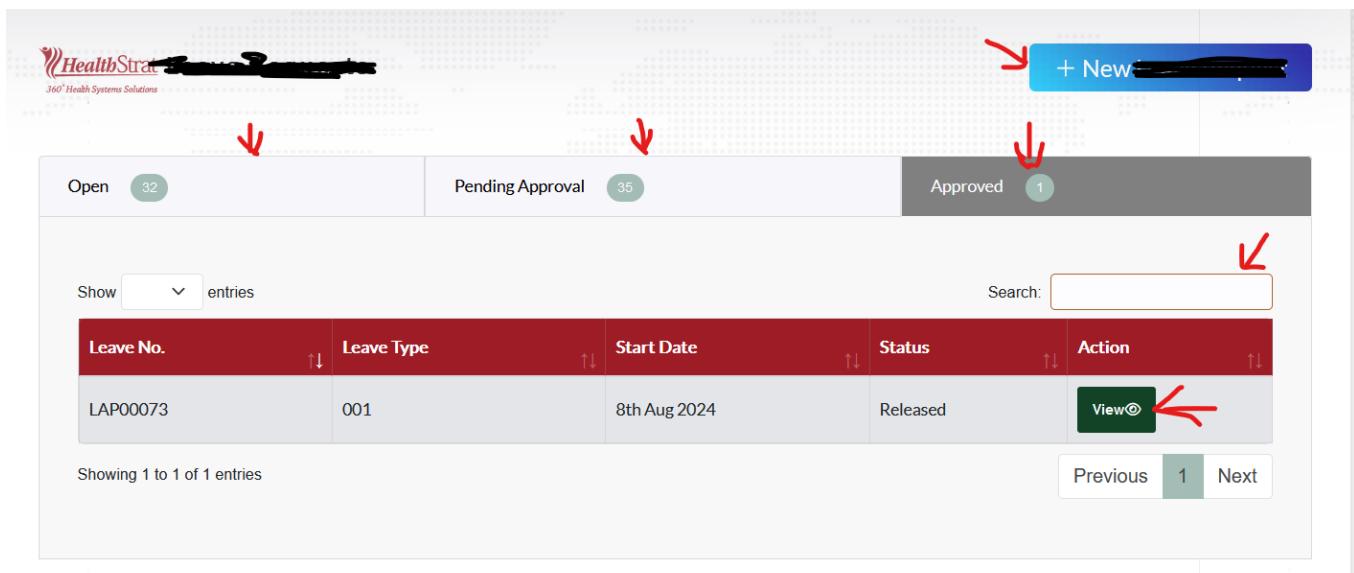
Fig 4: Sample request window

New – When clicked creates a new Request and opens to the editing window.
Open – Shows the number of Open Requests that have not been sent for Approval.

Pending Approval – Shows all Request Pending Approval.
Search – The search bar allows Users to search from a list of all your requests.
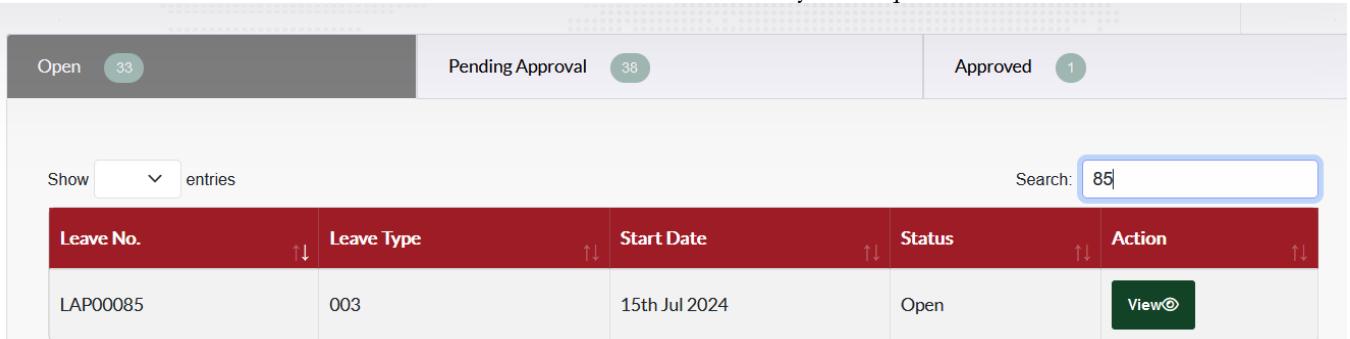
Fig 5: Search Image

View – View Opens the details of the Request and can only be editable under **New** and **Open**
Viewing Under pending approval, Users can see the List of Approvers as shown below.
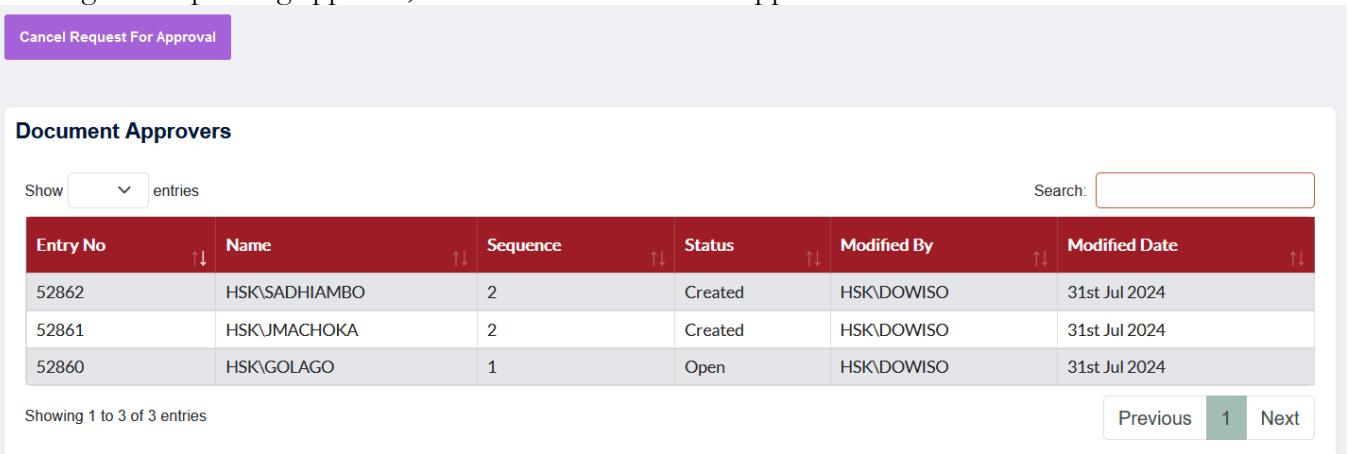
Fig 6: List of approvers

Cancell Approval Request – *There is also an approval cancellation button for users to cancel their Approval Requests.*

Approved - Shows all Approved Requests.

FINANCE

This section contains activities done at Finance level. They include:

1. Staff advance requisition
2. Staff advance surrender
3. Staff Claim

Staff advance requisition

To raise a new Staff advance requisition, go to:

➢ Finance >> Staff advance Requisition >> New advance request

Fig 7: New Advance Creation

Fig 8: New advance creation details filling

> ➢ Once you submit,
> ➢ Click on add Imprest lines

Fig 9: Imprest line addition and file upload

Fig 10: Lines addition

➢ Once you fill in the lines and submit. Kindly note that you can add as many attachments as you'd like.

➢ Attach the necessary documents

Fig 11: Document Upload

Fig 12: Document Upload

➢ In case you want to view the requisition lines or the attachments, click on the + action

➢ The last step is: Send the request for approval action. You will get an email notification to confirm that your request is undergoing the approval process

Staff advance Surrender

To raise a Staff advance Surrender, go to:

➢ Staff advance Surrender >> + New Advance Surrender
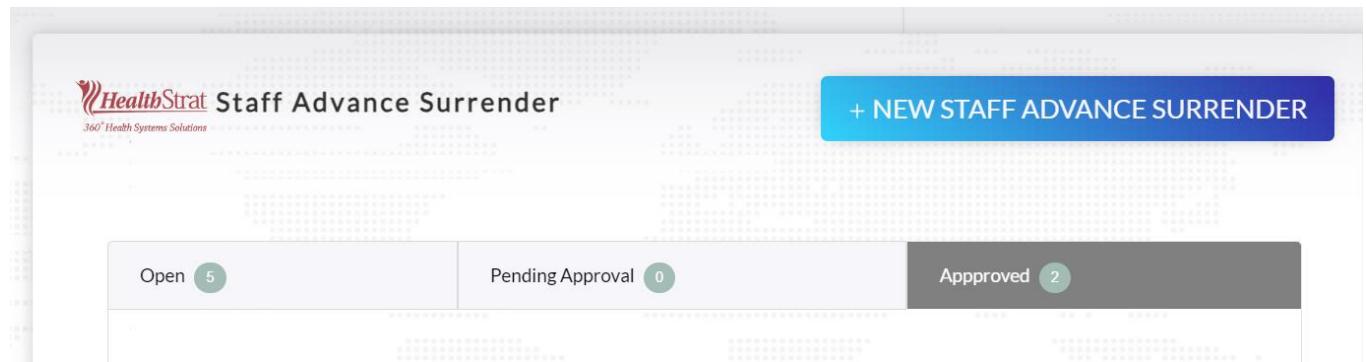
Fig 13: New Surrender Creation

➢ A window to select Imprest document to surrender will appear, select the document to surrender then click **submit**
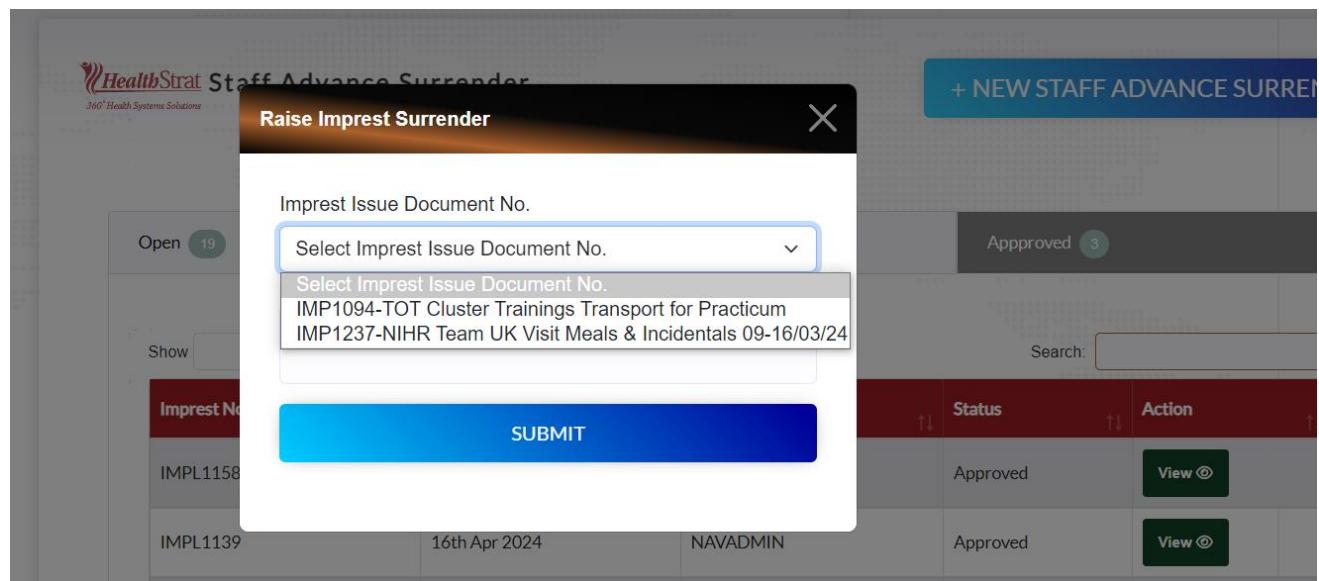

Fig 14: Surrender Document selection

➢ Once you click submit, you will see the page below where you will click **'add amount'** to add the actual amount spent.
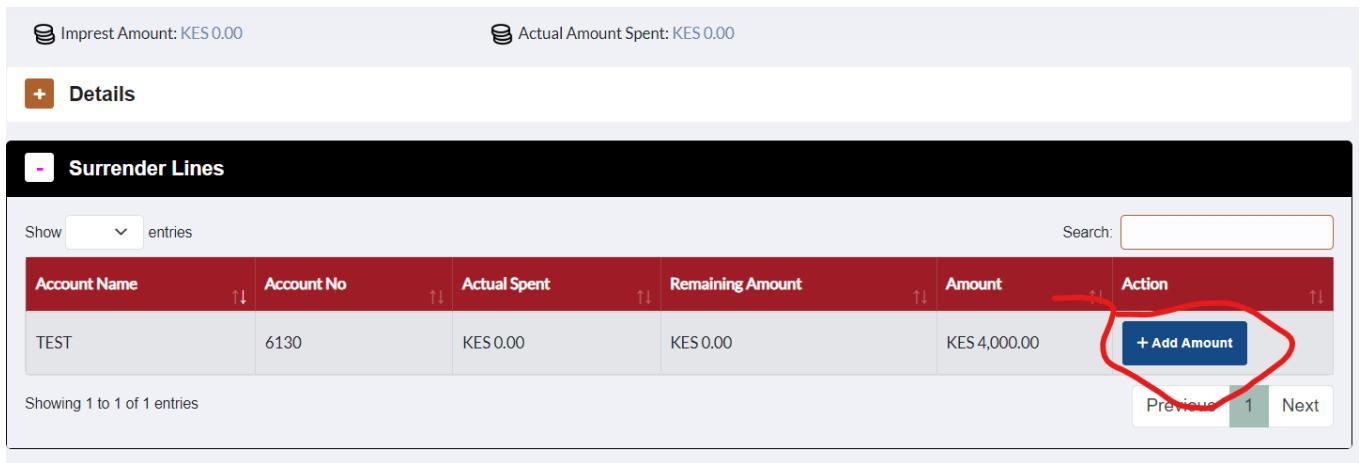
Fig 15: Amount spent addition

➢ Add the amount spent and submit
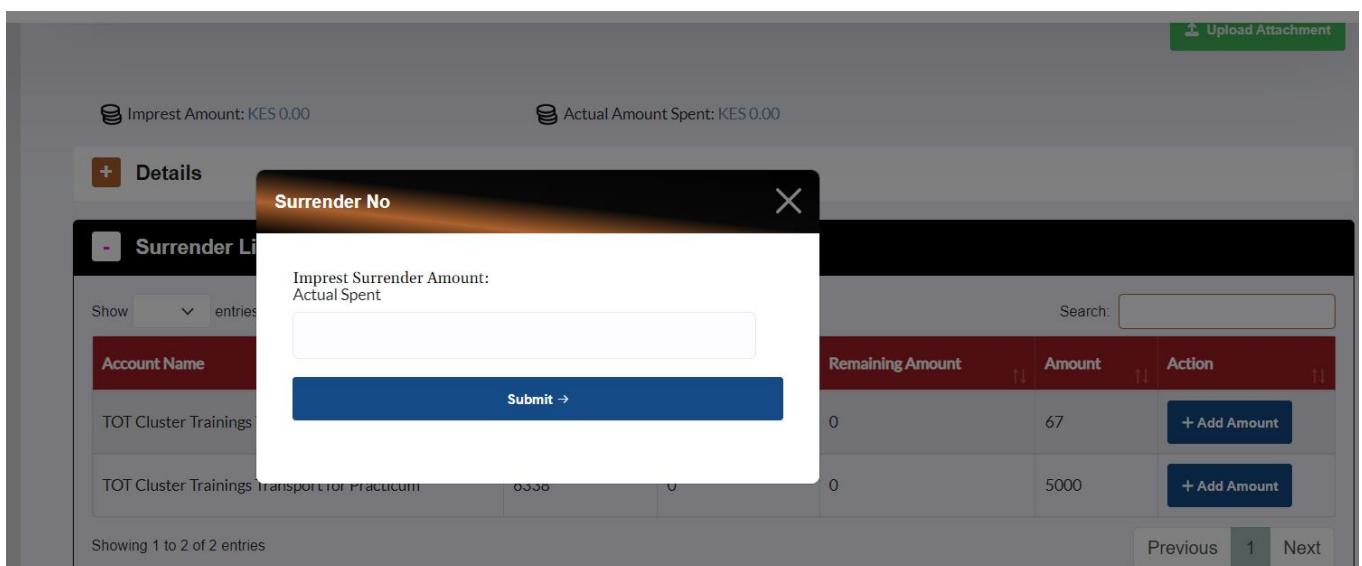
Fig 16: Add Amount

➢ Once you add the amount, upload the relevant attachments/receipts
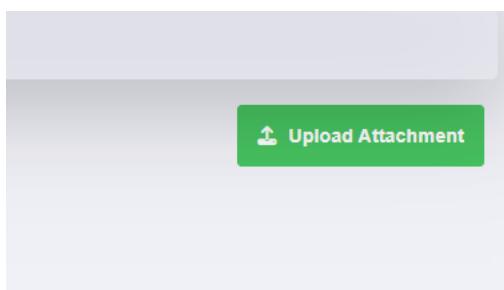
Fig 17: Document Upload

➢ Confirm if the attachments are uploaded then send the documents for approval

➢ You can cancel Approval Request to make amendments

Fig 18: Approval Cancellation

Staff Claim

To raise a new claim, go to:

➤ Staff Claim >> + New Staff Claim >> Submit
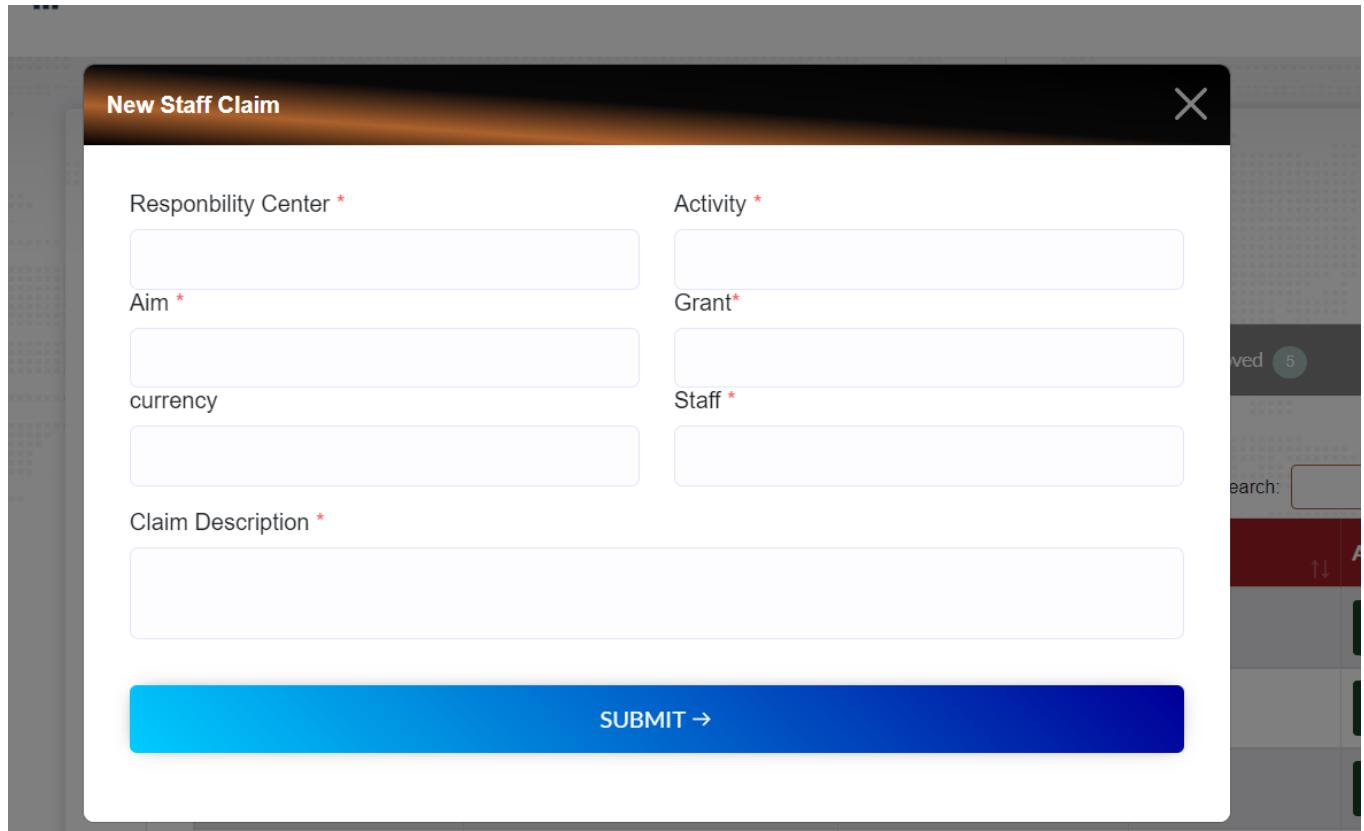
New Staff Claim

Responbility Center *

Activity *

Aim *

Grant*

currency

Staff *

Claim Description *

SUBMIT →

Fig 19: Document Upload

➤ To add lines, go to: View >> + Add Claim Lines >> Submit
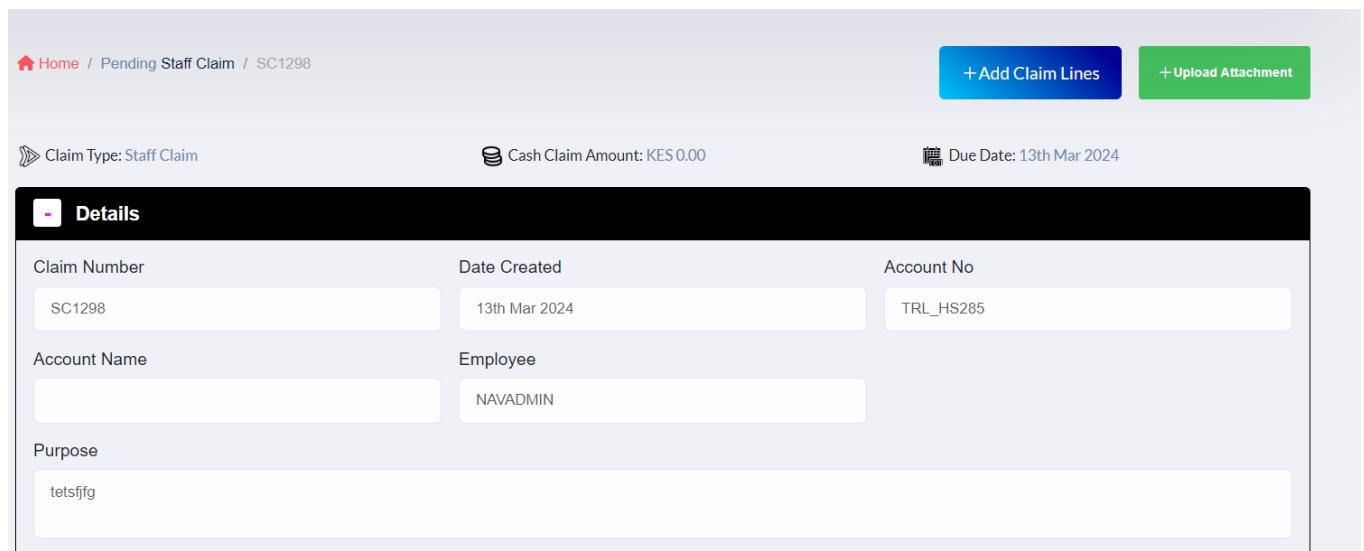
🏠 Home / Pending **Staff Claim** / SC1298   +Add Claim Lines +Upload Attachment

Claim Type: Staff Claim   Cash Claim Amount: KES 0.00   Due Date: 13th Mar 2024

Details

Claim Number	Date Created	Account No
SC1298	13th Mar 2024	TRL_HS285

Account Name	Employee	
	NAVADMIN	

Purpose

tetsfjfg

Fig 20: Lines addition

PROCUREMENT

This section outlines activities in the Procurement module. They include:

- Purchase Requisition

Purchase Requisition

To raise a new request, go to:

- ➢ Purchase Requisition >> + New Purchase Request.
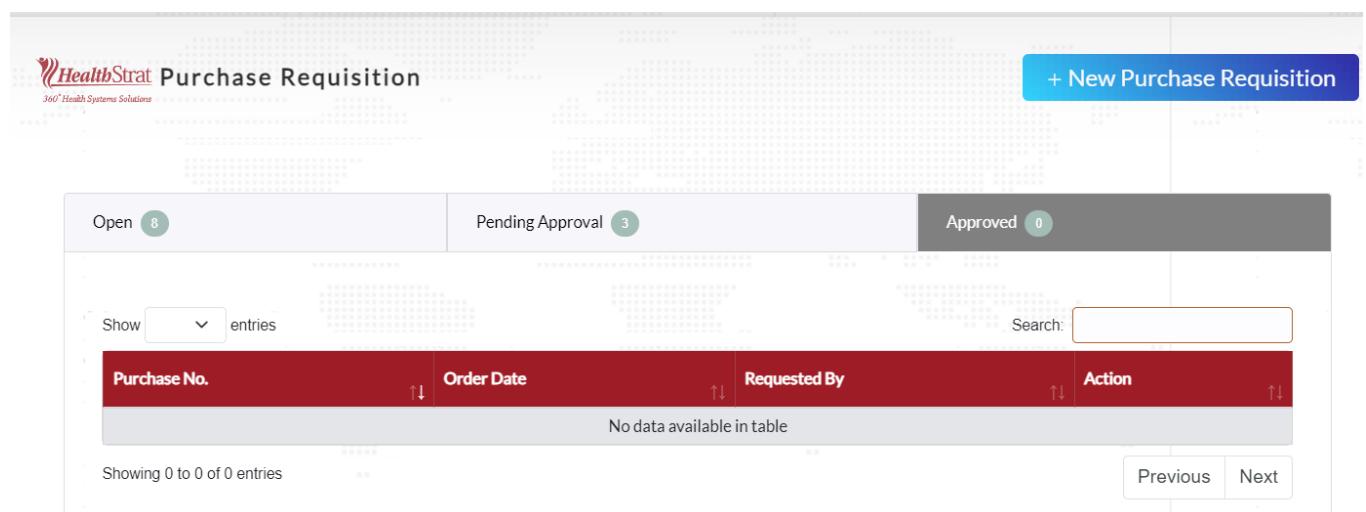
Fig 21: New Purchase Requisition Creation

- ➢ Fill in the Purchase request details correctly then submit
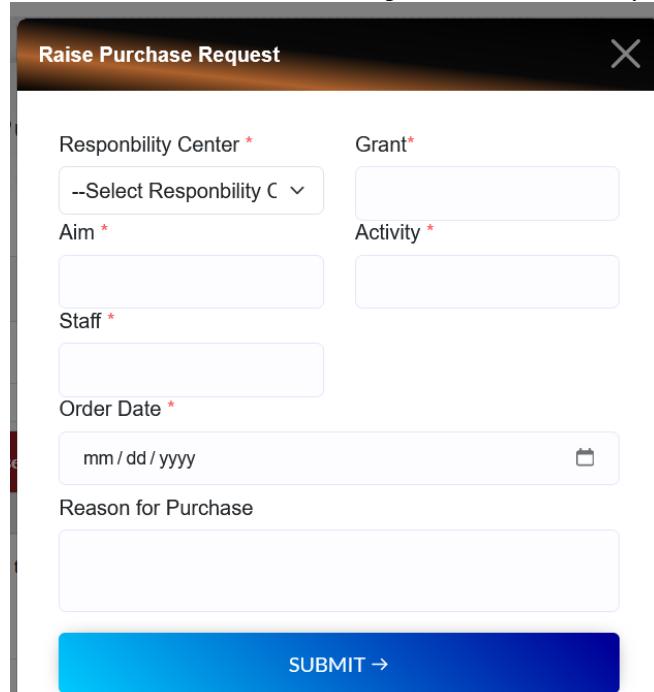
Fig 22: New Purchase Requisition Creation

To add lines, go to:

- ➢ Add requisition lines >> Fill relevant details in the next window.
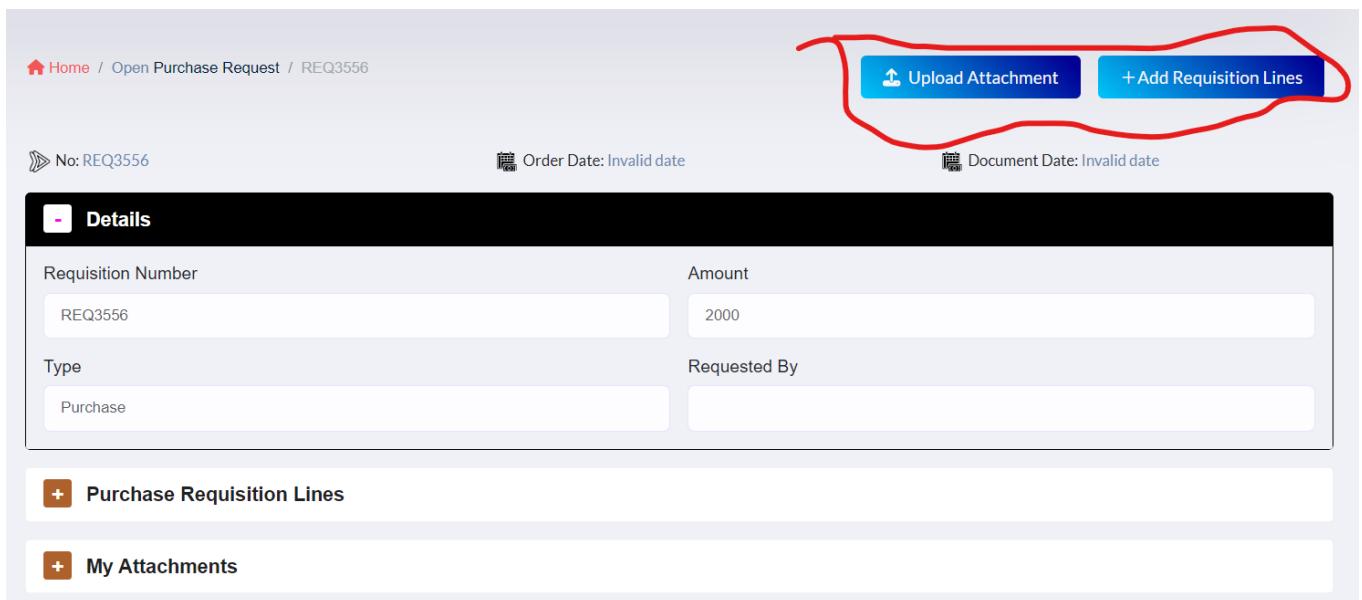
Fig 23: Requisition and file upload

➢ Add the requisition lines details
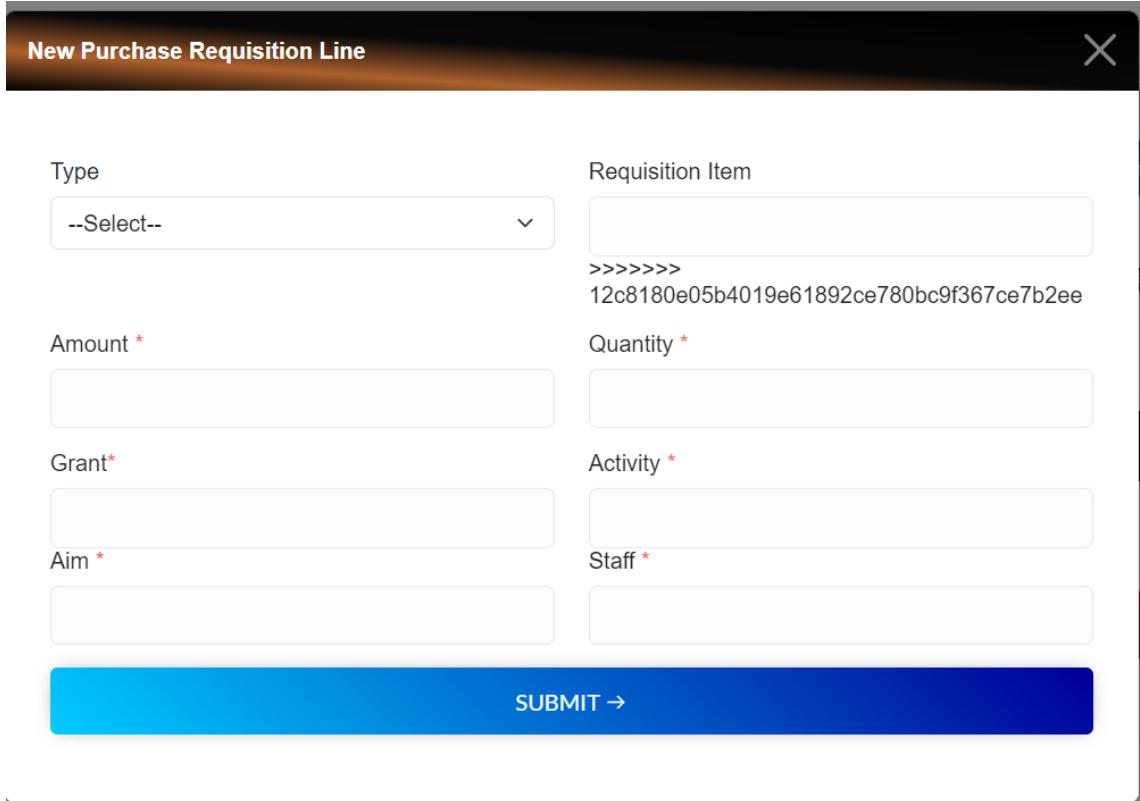
Fig 24: Purchase Requisition line details

➢ Add the Relevant Attachments the send for approval
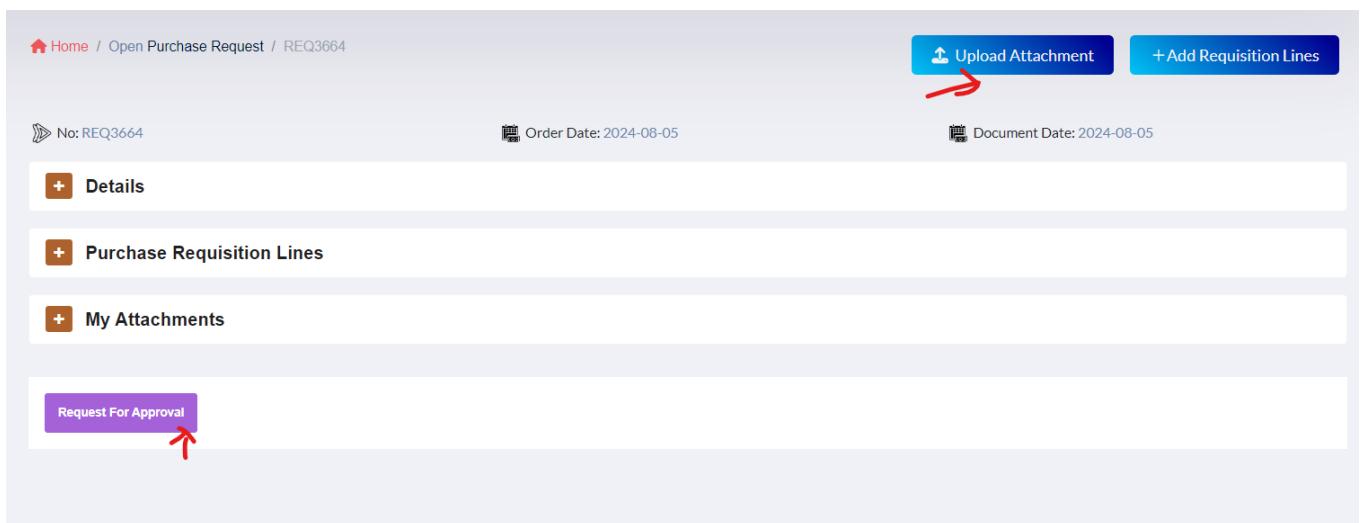
Fig 25: Request for approval

APPROVALS

➢ For approvals, there is a section under approvals where you can approve documents.
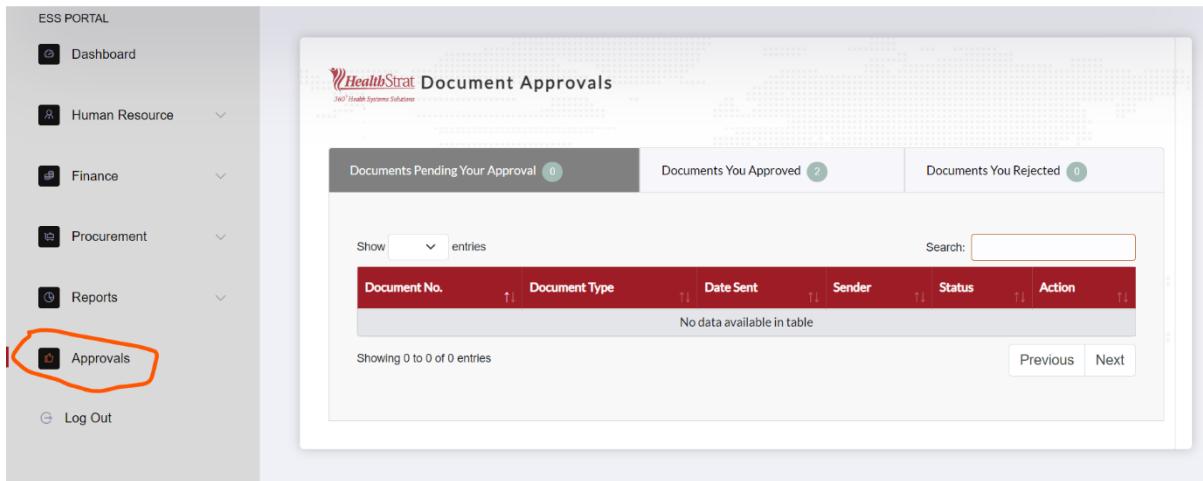
Fig 26: Approval Window

➢ Once you click on that, you will be able to see the documents pending approval, those approved and those you have rejected.
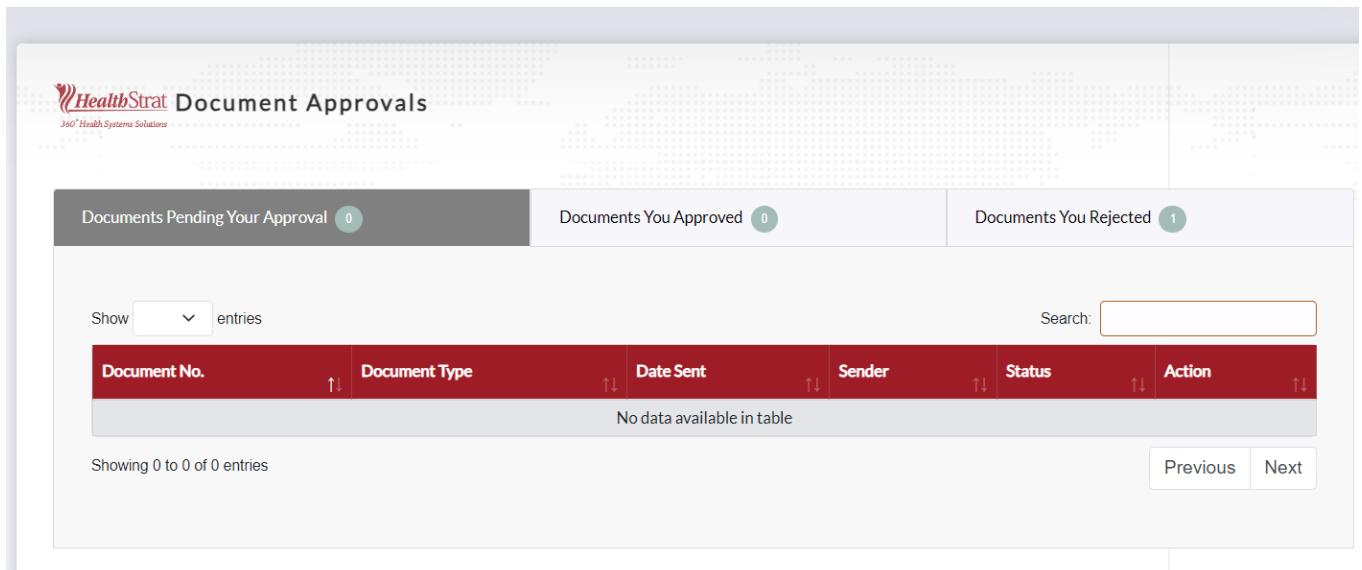
HUMAN RESOURCE MANAGEMENT

Under this section we have the following sub-modules:
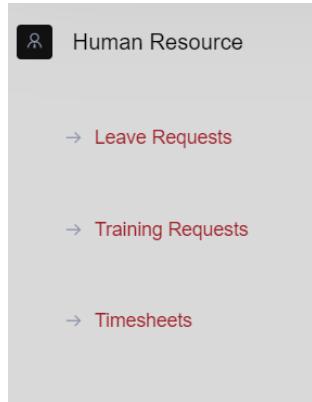
Leave Requests

➢ To raise a new leave request, Click on the '**+New Leave Request**'

➢ The dialog box below will appear for you to fill in the fields "leave type", "leave start date" and "Days applied" then click on save.

NOTE: *Sick leave allows users to backdate, other leave types are Planned in advance and hence should be applied earlier.*

> ➢ Once you click on save, for leave types such as **sick leave**, **paternity**, **maternity** and **study leave** you can upload a relevant attachment and click on next

> ➢ Once you click next, you can send the request for approval by clicking the action below.

> ➢ You can view the leave details and its status after sending for approval and clicking" View leave details"

| Leave Type: 001 | Days Applied: 5 | Leave Days Balance: 32 |

+ Details

+ My Attachments

Cancel Request For Approval

Document Approvers

Show [▼] entries   Search: [   ]

Entry No. ⇅	Name ⇅	Sequence ⇅	Status ⇅	Modified By ⇅	Modified Date ⇅
48472	NAVTEST	2	Open	NAVADMIN	2nd Aug 2024
48471	NAVADMIN	1	Approved	NAVADMIN	2nd Aug 2024

Showing 1 to 2 of 2 entries   Previous   1   Next

➢ To cancel approval, click on" **Cancel Request for Approval**"

Training requests

For training requests, we have two types:
- I. **Non-adhoc:** These are trainings that have been planned for/budgeted for by the organization. The training needs are already pre-set by the HR team. To apply for one:
- ➢ Click on '**+New Training Requests**'.

HealthStrat Training Requests   + New Training Request
360° Health Systems Solutions

| Open 9 | Pending Approval 1 | Approved 0 |

Request No.	Request Date	Adhoc	Start Date	End Date	No. Of Days	Action

➢ You will be prompted to fill in the fields below then submit.

II. **Ad hoc:** These are trainings that were not planned for by the organization. To apply for one:
➢ Click on New training Request >> select yes under Adhoc'

➢ You will be prompted to fill in the fields above then submit.

➢ The added details will be saved under Adhoc Training lines.

Adhoc Training Lines

Show [▼] entries   Search: [_____]

Training Name	Training Area	Training Objectives	Venue	Provider
TEST	IT	TEST1	ONLINE	TEST

Showing 1 to 1 of 1 entries   Previous **1** Next

> *You can also add attachment by clicking the Upload attachment on the to right of the page >> upload your selected document >> submit to add the attachment. It will appear as shown below.*

My Attachments

Davis July 2024 Timesheet.pdf.pdf

Davis Mutuku July 2024 Timesheet.pdf.pdf

Request For Approval

> You can preview the attachment by clicking the green download icon

Timesheets

> To create a new timesheet, click '**+ New Timesheet**'

HealthStrat Timesheets   **+ New Timesheet**

| Open | 40 | | Pending Approval | 0 | | Approved | 0 |

Show [▼] entries   Search: [_____]

Timesheet No	Date Captured	Period Date	Total Hours	Status	Action
		No data available in table			

Showing 0 to 0 of 0 entries   Previous Next

> You will be required to select the Timesheet period as shown below and click **'Submit.'**
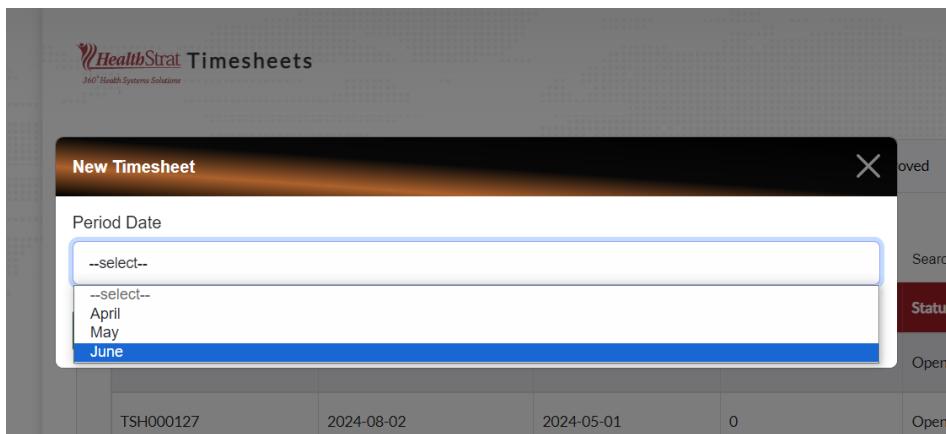
> ➤ Select +New Timesheet line to upload a new timesheet. Shown below>

> ➤ Open the Timesheet line >>fill project working with>>click submit >>submit button.

> ➤ Automatically, the line is generated to add hours worked as shown below. For Staff with several projects will repeat the previous step of adding lines and select their Projects respectively.

Total Hours	Description	Month	Days													
			Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	W
0	MESIS Year 4	8	5	8	5	0	0	7	7	7	8	9	0	0	0	0	
0	Health Strat FY 2024	8	8	9	9	0	0	7	6	9	9	0	0	0	0	0	
0	Becton Dickinson Oncology Project	8	6	7	8	0	0	0	0	0	0	0	0	0	0	0	

+ Details

- Lines

+ My Attachments

Request For Approval

➢ Click on the **save** button at the end of the lines to save the hours worked for each project.

➢ To upload Attachments (if any) >click + Upload Attachments.

🏠 Home / Timesheets / TSH000084   +Upload Attachment   + New Timesheet Line

》 Approval Status: Open

➢ Choose upload page >Choose file >Upload >Submit

⌨️ **⌂ Upload Attachment**   ✕

Attachment

| Choose Files | No file chosen |

Submit →

+Upload Attachment   + New Timesheet L

➢ Check uploaded Attachments > under "+ Attachments"
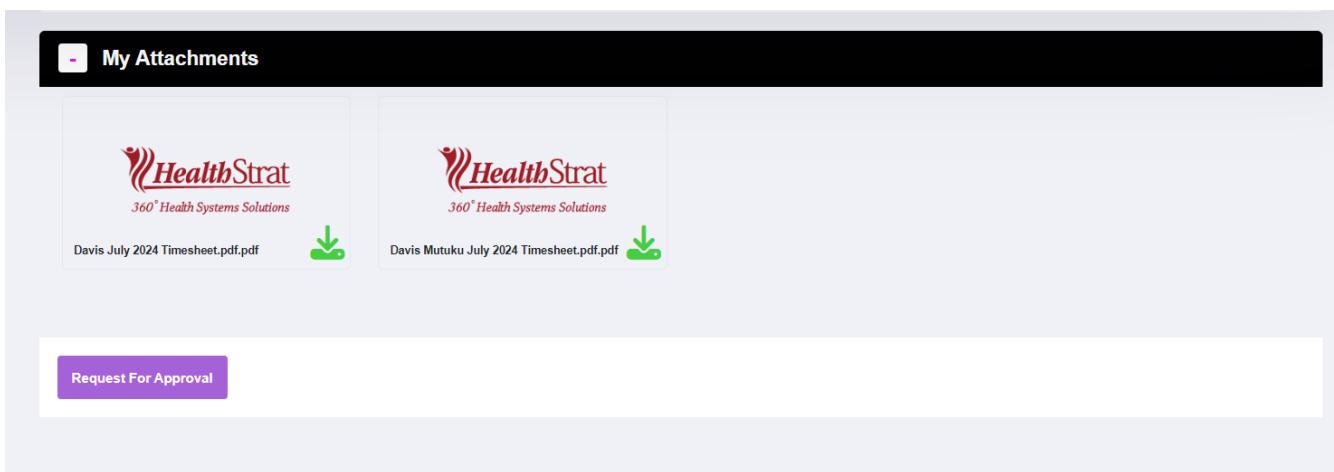
My Attachments

HealthStrat
360° Health Systems Solutions
Davis July 2024 Timesheet.pdf.pdf

HealthStrat
360° Health Systems Solutions
Davis Mutuku July 2024 Timesheet.pdf.pdf

Request For Approval

TRANSPORT

This section contains two sections:

1. Transport
2. Taxi
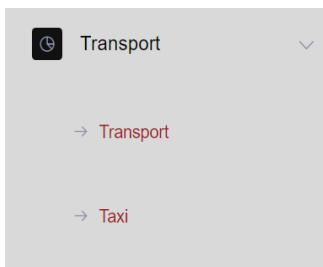
Transport

→ Transport

→ Taxi

Transport

➢ To create a new transport request: click on the '+New Transport Request' below.

➢ You will be directed to a new page, fill required fields as prompted below

- ➢ Fill in relevant details and Click on the 'submit' button.

- ➢ Fill the Employees Lines >Click on "+Add Traveling Employees" below

- ➢ Fill Employee details click "Submit" to fill the lines.
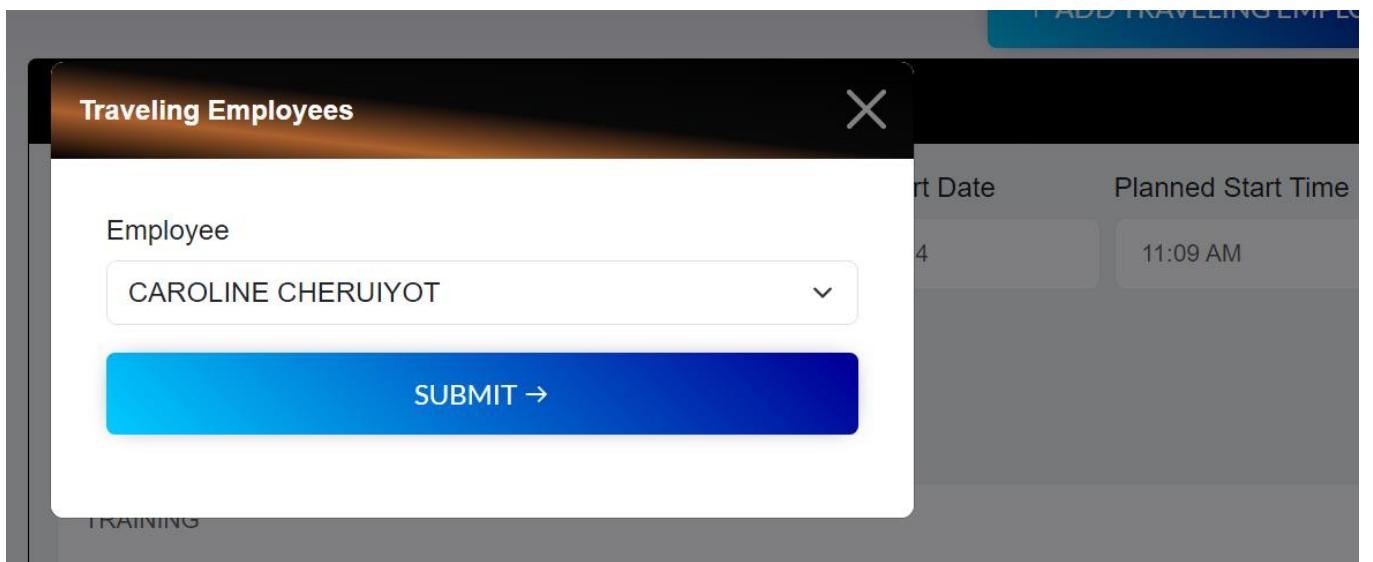
> ➤ Send the request for approval

Taxi

To make a taxi request click on the '+ New Taxi Request.
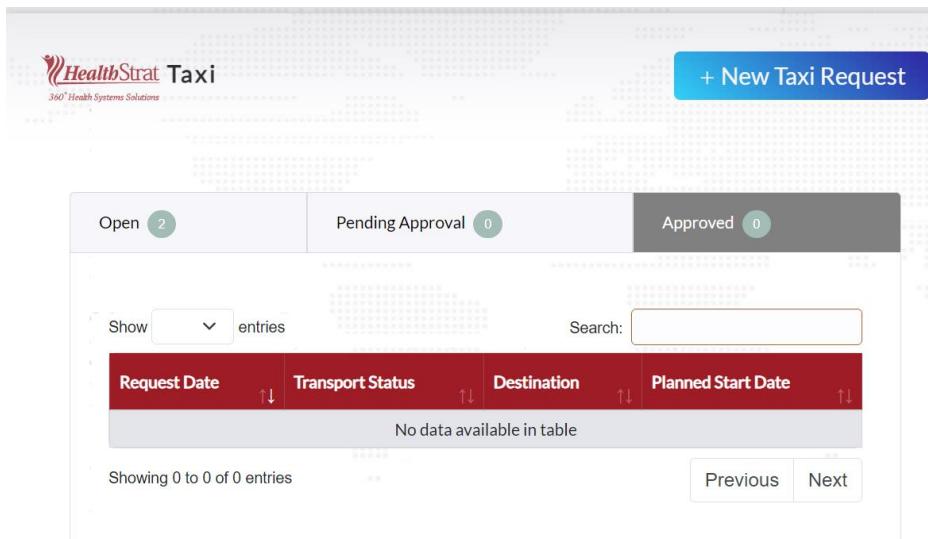
Fill in the required details below.

New Taxi Request

Start Date

mm/dd/yyyy

Start Time

--:-- --

End Date

mm/dd/yyyy

End Time

--:-- --

Car Capacity

Number of Night Outs

Pick Up from

Traveling Reason *

SUBMIT →

Click "Submit" to fill the

PERFORMANCE MANAGEMENT

Performance Management⌄

→ New Appraisal

→ My Appraisals

Under this module, we have 2 categories:

1. New Appraisals
2. My Appraisals

To create a new appraisal,

➢ Click on the '+ New appraisal and fill in the details following the spaces provided.

Fill the fields. >> Responsibly Center >> remakes >> Click "Start Appraisals".

Start New Performance Target >> Click on +New Performance Objectives

Below Table Set Targets > Fill description weight>Save Targets

Setting Appraisal Targets

Target Description

Weight

0

Maximum Score: (5)

Save Target →

Click "Get Attributes" field below.

Performance Targets

+ New Performance Target   Get Attributes →   Go Next →

Show [∨] entries   Search: [   ]

Key Responsibility ↑↓	Weight ↑↓	Mid Year Rating ↑↓	End Year Rating ↑↓	Action ↑↓
above average	4	0	0	N/A
5	1	0	0	N/A

Showing 1 to 2 of 2 entries   Previous 1 Next

■ Performance Attributes

← Prev   Initiate Appraisal →

Show [∨] entries   Search: [   ]

Attribute Description ↑↓	Maximum Score ↑↓	Mid Year Rating ↑↓	End Year Rating ↑↓	Action ↑↓
TIME MANAGEMENT	5	0	0	N/A
TEAM WORK	5	0	0	N/A
SOCIAL RESPONSIBILITY	5	0	0	N/A
PROFESSIONALISM	5	0	0	N/A
TRAINING AND DEVELOPMENT	5	0	0	N/A

Click "Initiate Appraisal" to view your generated Appraisal.

View existing appraisal records, click on "my Appraisals."

My Appraisals 4		Score Requests 0			

Show [∨] entries   Search: [   ]

Appraisal No. ↑↓	Appraisal Period ↑↓	Status ↑↓	Appraisal Stage ↑↓	Appraiser ↑↓	Action ↑↓
APP000033	2024	Setting	New	HS234	View →
APP000032	2024	Setting	Mid-Year	HS234	View →
APP000031	2024	Setting	Mid-Year	HS234	View →
APP000030	2024	Setting	Mid-Year	HS234	View →

Showing 1 to 4 of 4 entries   Previous 1 Next

REPORTS

Under reports we have sub-modules reports:

- Payroll reports- This helps to cross-check financial data.
- Leave reports- shows you all leave incurred (already taken), difference (unplanned and taken leave), and future scheduled (planned on the schedule for the future.

Payroll reports

To check reports posted click drop down 'select document'.
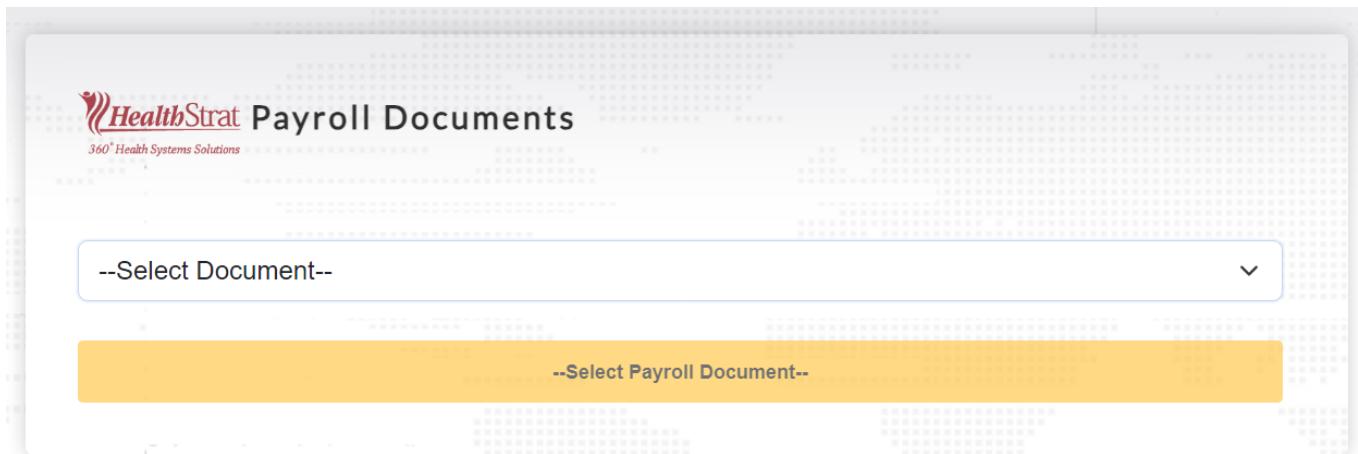
Select the document and fill details above>prompt to select document >select period>submit.

Leave report

Click on leave report>below.
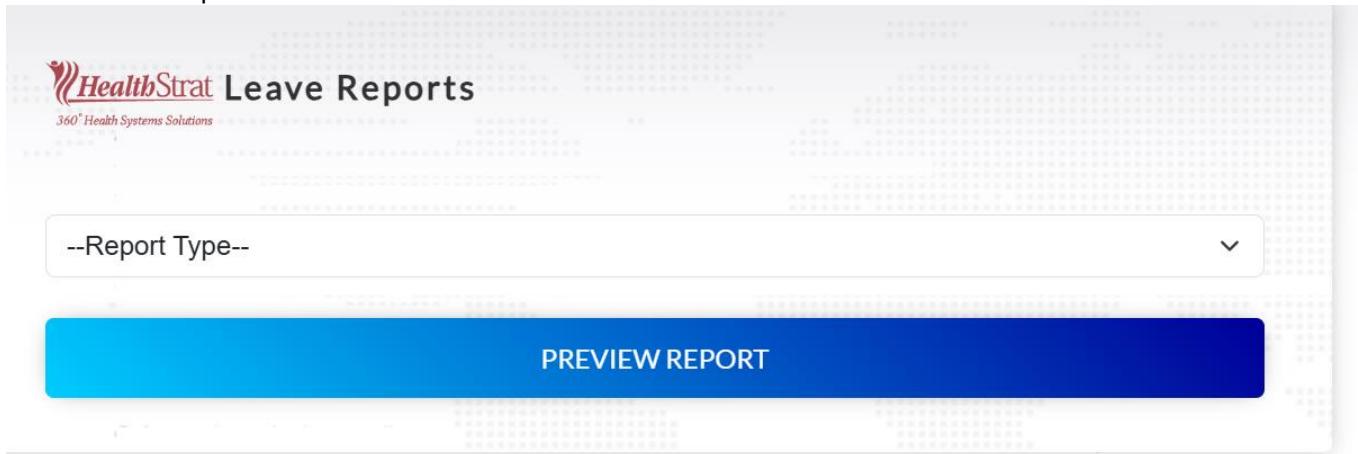
Choose the report type you will work with>click preview report button.