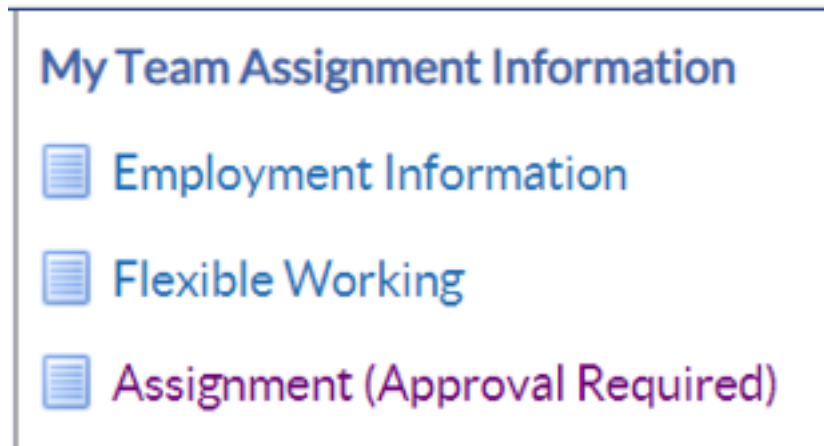


Manager Self Service -Assignment Changes

From the main menu, click Assignment (Approval Required).



Supervisor Hierarchy

You'll need to select the employee in your Supervisor Hierarchy.

Remember to click the plus icons to locate the correct employee or use the search bar if you have a large list of employees.

Once you have the correct employee, click the action icon.

NHS My Team Assignment Information


Search Home Favorites Settings Logged In As 505TRAIN22 Help Logout Portal

Name Go Advanced Search My List


Assignment (Approval Required): People in Hierarchy

TIP Click the action button next to the employee you wish to action. Click the details button for more information about the employee.

Focus Name	Assignment Number	Job	Organisation	Action	Details
Leese22, Vivian					
Admin22, Anthony	20006948	Administrative and Clerical Clerical Worker	505 Acute Nurse Management		
Johnson22, Andrew	20007338	Nursing and Midwifery Registered Staff Nurse	505 Ward 9		
Joshi22, Neela	20007368	Nursing and Midwifery Registered Staff Nurse	505 Ward 10		
Manager22, Michelle	20007639	Nursing and Midwifery Registered Nurse Manager	505 Acute Nurse Management		
Nelson22, Art	20007729	Nursing and Midwifery Registered Staff Nurse	505 Ward 10		
Sandwell22, Paula	20007910	Nursing and Midwifery Registered Staff Nurse	505 Ward 9		
Williams22, Judith	20008210	Nursing and Midwifery Registered Staff Nurse	505 Ward 10		
Wright22, Deirdre	20008240	Additional Clinical Services Health Care Support Worker	505 Ward 7		



Name Go Advanced Search My List



Focus Name

- Leese22, Vivian
- Admin22, Anthony
- Johnson22, Andrew
- Joshi22, Neela
- Manager22, Michelle
- Nelson22, Art
- Sandwell22, Paula
- Williams22, Judith
- Wright22, Deirdre

Effective Date

Next choose an effective date using either the calendar or typing in the date. Always use the effective date option.

Once set click Continue.

Assignment (Approval Required): Effective Date Options

☆

Effective Date 27-Sep-2023

Employee Name Manager22, Michelle
 Employee Number 20007639
 Job Nursing and Midwifery Registered(Nurse Manager)

Organisation 505 Acute Nurse Management
 Organization Email Address
 Supervisor Leese22, Vivian

Enter the date on which the changes should take effect, and press the Continue button.

Changes should take effect on the effective date as entered below.
 Effective Date 27-Sep-2023

Changes should take effect as soon as final approval is made.

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	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

Navigation: Back, Continue

Assignment Form

The Assignment Change form will be displayed. There are different sections dependant on the type of change.

Assignment (Approval Required): Assignment

Effective Date 25-Sep-2023

Employee Name Manager22, Michelle
 Employee Number 20007639
 Supervisor Leese22, Vivian

Organisation 505 Acute Nurse Management
 Job Nursing and Midwifery Registered(Nurse Manager)

* Indicates required field
 Enter or change any details below. Click Next to continue this action, click Back to return to the previous page, or click Cancel to cancel this action.

Assignment Status

Status: Active Assignment
 Change Reason: Migrated Record Default Assignment

Position

Position Name: 80156(Head of Nursing- Band 8b - S)

Job

Job Title: Nursing and Midwifery Registered(N)

Grade

Grade Name: NHS(XR09)Review Body Band 8 - R
[More Details ...](#)

Payroll

Payroll Name: 505 MonthlyT00

Organization

Organization Name: 505 Acute Nurse Management
 Address Line 1: Warwick ESR Training
 Address Line 2: Warwick Training Centre
 Town: Warwick
 County: Warwickshire
 Post Code: CV34 6NZ
[More Details ...](#)

People Group

Playpoint: Default Home
Default Employee Home Address

Expense User Type

Time and Attendance

Navigation: Cancel, Back, Next

The form will display the current details for the Employee. Each section will have a drop-down menu or search function.

You may need to change one area or multiple areas.

You will **not need** to complete a change in Manager Self Service, if it relates to a “Hire” that is completed through the TRAC Recruitment system.

A “Hire” is a new starter in the organisation, called an External Hire or an Internal Hire. This is an employee moving to a different role within the Organisation, as part of the Recruitment process.

Please contact the ESR Support Team or Recruitment if you are unsure and would like to check before carrying out an Assignment Change in Manager Self Service.

The Assignment Change form will be for changes that you would normally enter on the Contract Amendment Form (CAF).

Examples of changes are:

- Change of Assignment Status – Secondment or Acting Up (if not related to a TRAC Hire)
- Change of Position (if not related to a TRAC Hire)
- Fixed Term to Perm and vice versa.
- Extension of Fixed Term, including date / reason

Assignment Status

Assignment Status	
Status	Active Assignment
Change Reason	

The first section of the form is Assignment Status, most employees are marked as Active Assignment.

You may need to update this for a period of Acting Up (if not actioned

through Recruitment), Internal Secondment or External Secondment.

Any change here will ask for a Change Reason, so enter this at the beginning. Select the reason for change.

The screenshot shows a form titled "Assignment Status" with several fields: Status (set to "Active Assignment"), Change Reason (with a dropdown menu open), Position (with sub-fields Position Name and Job Title), Grade (with sub-field Grade Name), Payroll (with sub-field Payroll Name), and Organization. The dropdown menu for "Change Reason" lists the following options: Distinction Award, Employee Transfer, End of Fixed Term Contract, End of Fixed Term Contract - Completion of Training Scheme, End of Fixed Term Contract - End of Work Requirement, End of Fixed Term Contract - External Rotation, End of Fixed Term Contract - Other, Error Correction, Extension of Fixed Term Contract, Fixed Term Contract Made Permanent, Flexi Retirement, Has Not Worked, Hours Change, Migrated Record Default Assignment, Organisation Restructure, Payroll Change, Position Relocation, Pregnancy, Promotion, and Promotion and Transfer.

Position / Job / Grade / Payroll & Organisation

The next five sections are linked together with the ESR Position Number.

The ESR Position number will determine the job details, grade / band, the payroll, and the department (known as organisation in ESR).

This information is set when an ESR Position is created in ESR.

Position	Position Name	80117 Senior Nurse Band 6 - Ward 1
Job	Job Title	Nursing and Midwifery Registered S
Grade	Grade Name	NHS XR06 Review Body Band 6 More Details ...
Payroll	Payroll Name	505 MonthlyT00
Organization	* Organization Name	505 Ward 10 Address Line 1 Warwick ESR Training Address Line 2 Warwick Training Centre Town Warwick County Warwickshire Post Code CV34 6NZ More Details ...

If you need to change the job details, grade, or department then you will need to do so by searching for the Position number.


Please seek advice from the ESR Support Team where required, it is important to ensure that employees are placed in the correct position number.

Finding a new Position within the same department

The search function in the Position section will be dependent on the other fields, to search all the available positions in the department, remove the current details in Position, Job, and Grade.

Position	Position Name	<input type="text"/>	Q
Job	Job Title	<input type="text"/>	Q
Grade	Grade Name	<input type="text"/>	Q
		More Details ...	
Payroll	Payroll Name	505 MonthlyT00	Q
Organization	* Organization Name	505 Ward 10	Q

Once you have removed the current details, you can search for the new Position. Click on the search icon in the Position Name field.


Position	Position Name	<input type="text"/>	Q	
Job				
Grade	Job Title	<input type="text"/>	Q	

A search box will pop up, click Go.

Search and Select: Position Name Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Position Name ▾ Go 














Results

Select	Quick Select	Position Name
	No search conducted.	

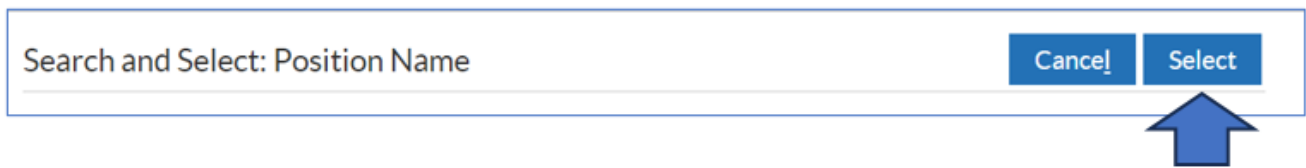
You will then see a list of the available positions in the department.

Search By Position Name ▾ Go

Results

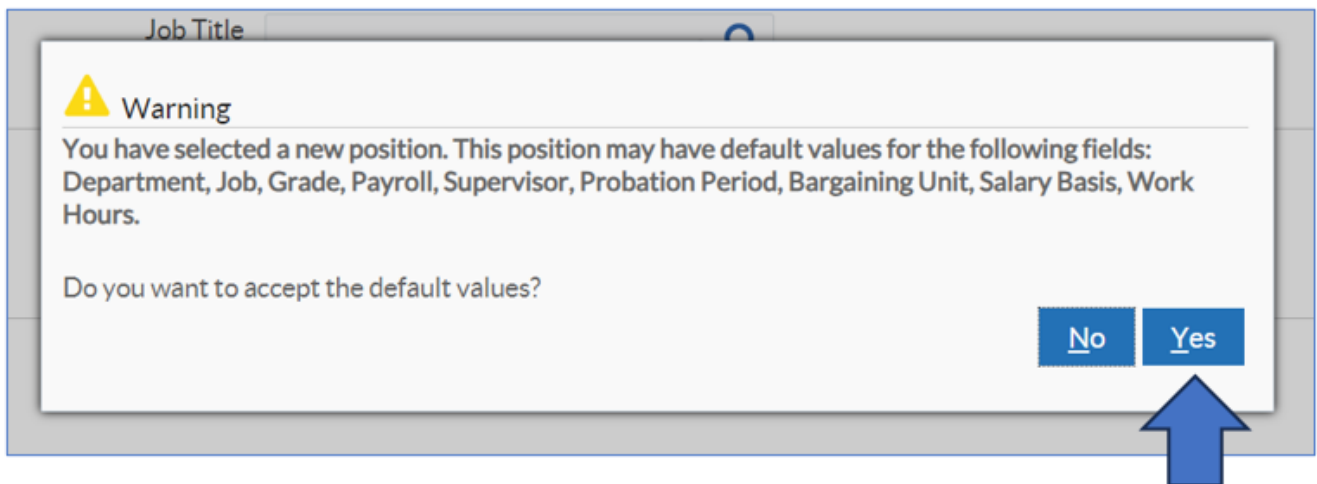
Select	Quick Select	Position Name
<input type="radio"/>		80107 Admin Assistant Band 2 - Ward 10 G2D Surgery
<input type="radio"/>		80108 Ward Co-Ordinator Band 3 - Ward 10 G2D Surgery
<input type="radio"/>		80109 Admin Officer Band 4 - Ward 10 G2D Surgery
<input type="radio"/>		80110 Ward Administrator Band 5 - Ward 10 G2D Surgery
<input type="radio"/>		80111 Nursing Assistant Band 2 - Ward 10 N9A Surgery
<input type="radio"/>		80112 Staff Nurse Band 3 - Ward 10 N9A Surgery
<input type="radio"/>		80113 Healthcare Assistant Band 3 - Ward 10 N9A Surgery
<input type="radio"/>		80114 Staff Nurse Band 4 - Ward 10 N9A Surgery
<input type="radio"/>		80115 Staff Nurse Band 5 - Ward 10 N6A Surgery
<input type="radio"/>		80116 Sister/Charge Nurse Band 6 - Ward 10 N6A Surgery
<input type="radio"/>		80117 Senior Nurse Band 6 - Ward 10 N6A Surgery
<input type="radio"/>		80118 Staff Nurse Band 6 - Ward 10 N6A Surgery
<input type="radio"/>		80119 Sister/Charge Nurse Band 7 - Ward 10 N6B Surgery

Pick the correct position and click select.



A search and select dialog box with a text input field containing the placeholder text "Search and Select: Position Name". To the right of the input field are two buttons: "Cancel" and "Select". A blue arrow points to the "Select" button.

The pop-up screen will close, and you will see a warning message.



A warning dialog box with a yellow warning icon and the text "Warning". Below the icon, it says "You have selected a new position. This position may have default values for the following fields: Department, Job, Grade, Payroll, Supervisor, Probation Period, Bargaining Unit, Salary Basis, Work Hours." Below this text is the question "Do you want to accept the default values?". At the bottom right, there are two buttons: "No" and "Yes". A blue arrow points to the "Yes" button.

This message is letting you know the Position number will populate the other fields, click Yes.

You will now see the updated information, same department but updated Position, Job details and Grade.

Position	Position Name	80119 Sister/Charge Nurse Band 7	Q
Job	Job Title	Nursing and Midwifery Registered Si	Q
Grade	Grade Name	NHS XR07 Review Body Band 7	Q
		More Details ...	
Payroll	Payroll Name	505 MonthlyT00	Q
Organization	* Organization Name	505 Ward 10	Q

If you have updated the grade and need to advise Payroll of the new salary, click on the More Details link below the Grade section.







A new screen will detail the salary points within that grade. Make a note of the salary or copy and paste to a note pad.

You can advise the salary later in the form.

Grade Steps				
Grade Point	Grade Step	Grade Rate	Step Value	Units
260	1	NHS Pay Scale Letter XR 0	0	M
300	3	NHS Pay Scale Letter XR 0	0	M
280	2	NHS Pay Scale Letter XR	30639	M
320	4	NHS Pay Scale Letter XR	34581	M
340	6	NHS Pay Scale Letter XR	34581	M
350	8	NHS Pay Scale Letter XR	34581	M
322	5	NHS Pay Scale Letter XR	35392	M
342	7	NHS Pay Scale Letter XR	35392	M
352	9	NHS Pay Scale Letter XR	37350	M
360	10	NHS Pay Scale Letter XR	37350	M
380	11	NHS Pay Scale Letter XR	37350	M
390	12	NHS Pay Scale Letter XR	42618	M
400	13	NHS Pay Scale Letter XR	42618	M
410	14	NHS Pay Scale Letter XR	42618	M
420	15	NHS Pay Scale Letter XR	42618	M

People Group

Do not update this section. RCHT Payroll Department maintain this section in ESR.

People Group	
* Paypoint	Default Home  
	<small>Default Employee Home Address</small>
Expense User Type	 
Time and Attendance	 


Other Assignment Information



In this section you can update the Assignment Category, Fixed Term end dates and Fixed Term Reasons.



You will not need to update anything else in this section.

Other Assignment Information

Employee Category Full Time

Assignment Category Permanent 

Fixed Term / Temp Con End Date  

Fixed Term / Temp Cont Reason  

Salary Information & Location

You **do not** need to update anything in these sections.

Salary Information

Salary Basis

Salary Review Period



Salary Review Frequency

Performance Review Period

Performance Review Frequency

Location

Working At Home

* Location 505 ESRH  

Address Line 1 Warwick ESR Training

Address Line 2 Warwick Training Centre

Town Warwick

County Warwickshire

Post Code CV34 6NZ

Working Schedule

If you are updating hours as part of this change, you can update the hours here.

Do not update Frequency, start, or end times.

Working Schedule

Work Hours

Frequency

Normal Start Time

Normal End Time

You have reached the end of the form, you can go back, cancel or if ready to move forward click Next.

Change Supervisor

In the next screen you'll be asked if a change of supervisor is required.

NHS My Team Assignment Information Search Home Favorites Settings Logged In As 505WARD10 Help Logout Portal

Assignment (Approval Required): Change Supervisor

Effective Date 18-Oct-2023

Employee Name	Josh22, Neela	Organisation	505 Ward 10
Employee Number	20007368	Organization Email Address	
Job	Nursing and Midwifery Registered Staff Nurse	Supervisor	Leese22, Vivian

Assign a New Supervisor

You can assign the selected person to a new supervisor in the field below.

Supervisor

Assignment Number

You can search for the new supervisor with the search icon in the “Assign New Supervisor” section.

Assign a New Supervisor

You can assign the selected person to a new supervisor in the field below.

Supervisor 

Assignment Number



Searching by Name normally produces the best results.

Find the new supervisor, ensure you have the correct person and then click the button to the left of the name, then click Select in the top right.

Search and Select: Supervisor





Search



To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Results

Rows 1 to 45

Select	Quick Select	Worker Name	Last Name	Organisation	Job	Position	Business Group	Assignment Number
<input type="radio"/>		Wright02, Deirdre	Wright02	505 Ward 7	Additional Clinical Services Health Care Support Worker	80067 Nursing Assistant Band 2 - Ward 7 N9A Surgery	NHS Business Group	20008220
<input type="radio"/>		Wright03, Deirdre	Wright03	505 Ward 7	Additional Clinical Services Health Care Support Worker	80067 Nursing Assistant Band 2 - Ward 7 N9A Surgery	NHS Business Group	20008221
<input type="radio"/>		Wright04, Deirdre	Wright04	505 Ward 7	Additional Clinical Services Health Care Support Worker	80067 Nursing Assistant Band 2 - Ward 7 N9A Surgery	NHS Business Group	20008222
<input type="radio"/>		Wright05, Deirdre	Wright05	505 Ward 7	Additional Clinical Services Health Care Support Worker	80067 Nursing Assistant Band 2 - Ward 7 N9A Surgery	NHS Business Group	20008223

Your new supervisor will now show in the main screen.

Click Next when ready.

Assignment (Approval Required): Change Supervisor Cancel Back Next

Effective Date 18-Oct-2023


Employee Name	Joshi22, Neela	Organisation	505 Ward 10
Employee Number	20007368	Organization Email Address	
Job	Nursing and Midwifery Registered Staff Nurse	Supervisor	Leese22, Vivian

Assign a New Supervisor

You can assign the selected person to a new supervisor in the field below.

Supervisor

Assignment Number 20008220



Direct Reports

The next screen you can update any direct reports if required.

Assignment (Approval Required): Assign New Directs Cancel Back Next

Effective Date 18-Oct-2023

Employee Name	Joshi22, Neela	Organisation	505 Ward 10
Employee Number	20007368	Organization Email Address	
Job	Nursing and Midwifery Registered Staff Nurse	Supervisor	Leese22, Vivian

Assign New Direct Reports

You can assign new direct reports to the selected person in the New Direct Report fields.


Effective Transfer Date	New Direct Report	Job	Remove	Change Reason
18-Oct-2023 <input type="button" value="Calendar"/> <input type="button" value="Info"/>	<input type="text" value=""/> <input type="button" value="Q"/>		<input type="button" value="Remove"/>	<input type="button" value="Change Reason"/> Change of Supervisor













You can click on the green plus sign if you need to add more than one.

To add names, click on the search icon and you can amend the effective date if required.

Assign New Direct Reports

You can assign new direct reports to the selected person in the New Direct Report fields.



Effective Transfer Date	New Direct Report
18-Oct-2023  	<input type="text"/>  
18-Oct-2023  	<input type="text"/>  
18-Oct-2023  	<input type="text"/>  

You'll need to search and select for each row.

Search and Select: New Direct Report






[Cancel](#) [Select](#)

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By [Go](#)













Results

Select	Quick Select	Worker Name	Last Name	Organisation	Job	Business Group	Assignment Number	Primary
<input type="radio"/>		Admin22, Anthony	Admin22	505 Acute Nurse Management	Administrative and Clerical Clerical Worker	NHS Business Group	20006948	Yes
<input type="radio"/>		Hall22, Helen	Hall22	505 Midwifery Nurse Management	Nursing and Midwifery Registered Midwife - Manager	NHS Business Group	20007218	Yes
<input type="radio"/>		Johnson22, Andrew	Johnson22	505 Ward 9	Nursing and Midwifery Registered Staff Nurse	NHS Business Group	20007338	Yes
<input type="radio"/>		Leader22, Trevor	Leader22	505 Ward 9	Nursing and Midwifery Registered Modern Matron	NHS Business Group	20007488	Yes
<input type="radio"/>		Limit22, Lee	Limit22	505 Team	Nursing and Midwifery	NHS Business	20007609	Yes

When you pick the right name, click Select.

Assign New Direct Reports

You can assign new direct reports to the selected person in the New Direct Report fields.

Effective Transfer Date	New Direct Report
18-Oct-2023  	Admin22, Anthony  
18-Oct-2023  	Leader22, Trevor  
18-Oct-2023  	Limit22, Lee  

Once you have added all the new direct reports, click Next.



Work Schedule Check

The next screen will ask again if there is a change in hours, if you didn't update in the Assignment section you can do so here if required.

Click Next.

Assignment (Approval Required): Work Schedule

Effective Date 18-Oct-2023

Employee Name	Joshi22, Neela	Organisation	505 Ward 10
Employee Number	20007368	Organization Email Address	
Job	Nursing and Midwifery Registered Staff Nurse	Supervisor	Leese22, Vivian


Work Hours

Frequency

Normal Start Time

Normal End Time

Use 24-hour clock, e.g. 09:00



Assignment Review

The final screen will display the changes that you have made.

Any changes will be shown in the Proposed section with a blue dot against it. Check the changes, if you need to amend anything click Back to edit in the previous screens.

Assignment (Approval Required): Review

Effective Date 18-Oct-2023

Employee Name Josh22, Neela
Employee Number 20007348
Job Nursing and Midwifery Registered(Staff Nurse)

Organisation 505 Ward 10
Organisation Email Address
Supervisor Leese22, Vivian

Review your changes and, if needed, attach supporting documents.
[Indicates Changed Items](#)

Assignment

	Current	Proposed
Organisation	505 Ward 10	505 Ward 10
Job	Nursing and Midwifery Registered(Staff Nurse)	Nursing and Midwifery Registered(Sister or Charge Nurse)
Worker is a Manager	Yes	Yes
Position Name	80117(Senior Nurse Band 6 - Ward 10NMB/Surgery)	80119(Sister/Charge Nurse Band 7 - Ward 10NMB/Surgery)
Location	505 ESRH	505 ESRH
Grade Name	NHS(XR06)(Review Body Band 6)	NHS(XR07)(Review Body Band 7)
Grade Point	300	330
Grade Step	0	1
Payroll Name	505 Monthly T00	505 Monthly T00
Paypoint	Default Home	Default Home
Assignment Status	Active Assignment	Active Assignment
Change Reason	Migrated Record Default Assignment	Covering Career Break
Absence Accrual Start Date	01-Apr-2019	01-Apr-2019
Ns. of Increments	1	1
Work Hours	37.5	37.5
Frequency	Week	Week
Employee Category	Full Time	Full Time
Assignment Category	Permanent	Permanent
Primary Assignment	Yes	Yes

Work Schedule

	Current	Proposed
Work Hours	37.5	37.5
Frequency	Week	Week
Assignment Category	Permanent	Permanent
Absence Accrual Start Date	01-Apr-2019	01-Apr-2019
Ns. of Increments	1	1

New Supervisor

Worker Name	Current Supervisor Name	Proposed Supervisor Name	Effective Transfer Date
Josh22, Neela	Leese22, Vivian	Wright02, Deirdre	18-Oct-2023

New Direct Reports

Worker Name	Job	Current Supervisor Name	Proposed Supervisor Name	Effective Transfer Date
Lint22, Lee	Nursing and Midwifery Registered(Mobile)	Hall22, Helen	Josh22, Neela	18-Oct-2023
Leader22, Trevor	Nursing and Midwifery Registered(Matern/Matron)	Manager22, Michelle	Josh22, Neela	18-Oct-2023
Admin22, Anthony	Administrative and Clerical(Clerical Worker)	Leese22, Vivian	Josh22, Neela	18-Oct-2023

When you have checked your changes, scroll down to the next section.

Comments & Submit Change

Enter any comments that will help the Approvers. This is also where you can enter any further details for Payroll, such as the salary if updating the grade.

The screenshot shows a web form titled "Approvers". At the top, there is a table with three columns: "Details/Approver", "Status", and "Delete". The first row contains a right-pointing arrow, "523 SSHR Payroll Approvals", an empty cell, and a trash icon. Below the table is a link "Add Adhoc Approver". Underneath is a section "Comments to Approver" with a large text input field. A blue arrow points from the right towards this input field. At the bottom right of the form, there are four buttons: "Cancel", "Printable Page", "Back", and "Submit". A blue arrow points upwards towards the "Submit" button.

When ready Click Submit.




You'll see a confirmation screen, so you can see that the changes have now been submitted for Approval to Payroll.

When Payroll approve, the change will be updated in ESR.

This screenshot is identical to the one above, showing the "Approvers" form. It includes the table with "523 SSHR Payroll Approvals", the "Add Adhoc Approver" link, the "Comments to Approver" text box, and the "Cancel", "Printable Page", "Back", and "Submit" buttons. A blue arrow points from the right towards the text box, and another blue arrow points upwards towards the "Submit" button.

If you need to check on the progress of your change you can do this Transaction Monitor within your Manager Menu.

Manager

-  Notifications
-  All Actions Awaiting Your Attention
-  Transaction Monitor

Please see the **Manager Notifications and Transaction Monitor Guide** for how to check progress.

The ESR Hub has short e-learning guides on how to Change Hours in MSS.

[How do I change an employee's assignment details?](#)

For further support on how to use Manager Self Service and the Manager Portal, there is helpful guidance on the ESR Hub:

[Home - ESR Hub - NHS Electronic Staff Record](#)

Please contact the ESR Team for support in using Manager Self Service:
rcht.esrsupportteam@nhs.net

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=380>