

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.

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.

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.

| Assignment Status | |
|-------------------|-------------------|
| Status | Active Assignment |
| Change Reason | |
| Position | |
| Job | |
| Grade | |
| Payroll | |
| Organization | |

Position Name

Job Title

Grade Name

Payroll Name

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






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

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"/>  |
| Job | |
| Job Title | <input type="text"/>  |
| Grade | |

Search: Position Name



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

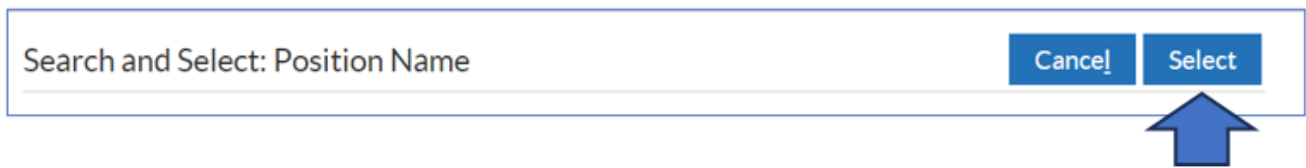
Position Name ▾

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 |

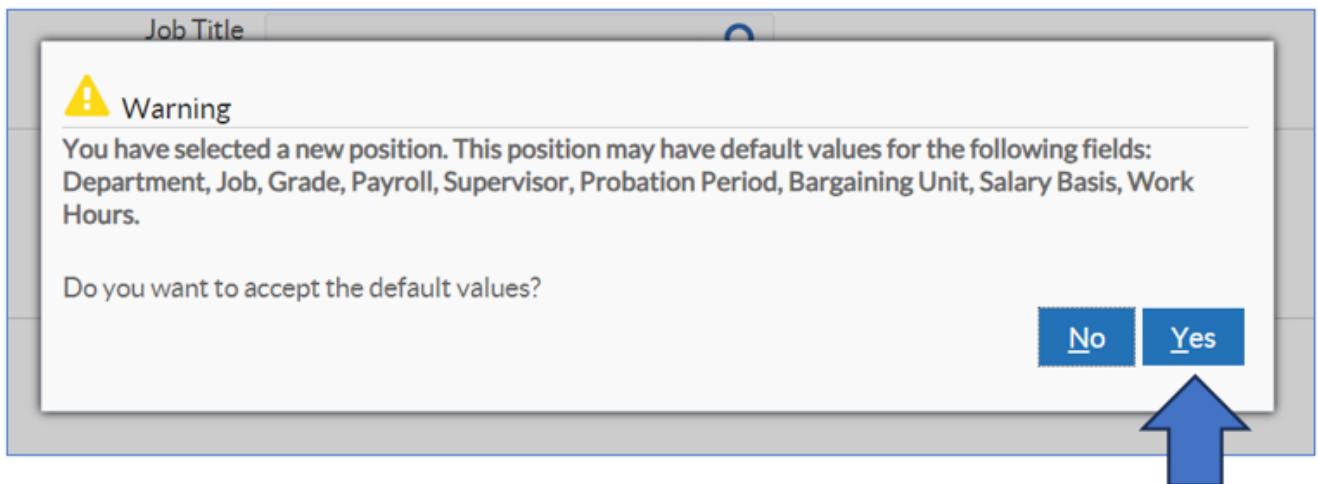
Pick the correct position and click select.



Search and Select: Position Name

Cancel Select

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



Job Title

Warning


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.

Do you want to accept the default values?

No Yes

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 | M |
| 300 | 3 | NHS Pay Scale Letter XR | 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   |
| | Default Employee Home Address |
| 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 | |
|--|--|
| <input type="checkbox"/> 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

37.5

Frequency

Week

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.

Cancel

Back

Next

Change Supervisor

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

My Team Assignment Information

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

Assignment (Approval Required): Change Supervisor

Cancel | Back | Next

Effective Date 18-Oct-2023

Employee Name

Josh22, Neela

Employee Number

20007368

Job

Nursing and Midwifery Registered|Staff Nurse

Organisation

505 Ward 10

Organization Email Address

Supervisor

Leese22, Vivian

Assign a New Supervisor

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

Supervisor

Leese22, Vivian

Assignment Number

20006918

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

Leese22, Vivian

🔍

Assignment Number

20006918



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

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



Worker Name

Go

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

Employee Number

20007368

Organisation

505 Ward 10

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

Wright02, Deirdre

Assignment Number

20008220



Direct Reports

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

NHS

My Team Assignment Information

Search

Home

Favorites

Settings

Logged In As S05TRAIN22

Help

Logout

Portal

Assignment (Approval Required): Assign New Directs

Cancel

Back

Next

Effective Date 18-Oct-2023

Employee Name

Joshi22, Neela

Employee Number

20007368

Organisation

505 Ward 10

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 | | | | 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









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 Worker Name 



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 and 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 Josh22, Neela
Employee Number 20007368
Job Nursing and Midwifery Registered[Staff Nurse]

Organisation 505 Ward 10
Organization Email Address
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 NameJosh22, Neela

Employee Number20007348

JobNursing and Midwifery Registered(Staff Nurse)

Organisation505 Ward 10

Organisation Email Address

SupervisorLeese22, 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 10)N&M(Surgery) | 80119(Sister/Charge Nurse Band 7 - Ward 10)N&M(Surgery) |
| Location | 505 ESRH | 505 ESRH |
| Grade Name | NH5(XR06)(Review Body Band 6 | NH5(XR07)(Review Body Band 7 |
| Grade Point | 330 | 330 |
| Grade Step | 4 | 1 |
| Payroll Name | 505 MonthlyT00 | 505 MonthlyT00 |
| 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 | Winghe02, Deirdre | 18-Oct-2023 |

New Direct Reports

| Worker Name | Job | Current Supervisor Name | Proposed Supervisor Name | Effective Transfer Date |
|------------------|--|-------------------------|--------------------------|-------------------------|
| Lim22, Lee | Nursing and Midwifery Registered(Midwife) | 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.

Approvers

| Details / Approver | Status | Delete |
|------------------------------|--------|--------|
| > 523 SSHR Payroll Approvals | | |

► Add Adhoc Approver

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

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.

Approvers

| Details / Approver | Status | Delete |
|------------------------------|--------|--------|
| > 523 SSHR Payroll Approvals | | |

► Add Adhoc Approver

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

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>