

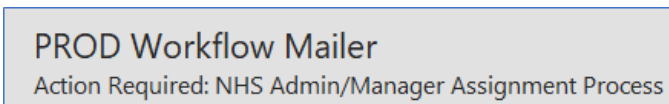
# Manager Self Service - Approving Manager Guide

As an Approving Manager, with Manager Self Service access, you can make changes directly but will also need to approve change transactions completed by a user with Admin Self Service.

You will be notified in ESR, along with a notification email. You can see your notification it in the top right menu on the main portal screen. If you have new notification, it will be highlighted with the number of new notifications in red.



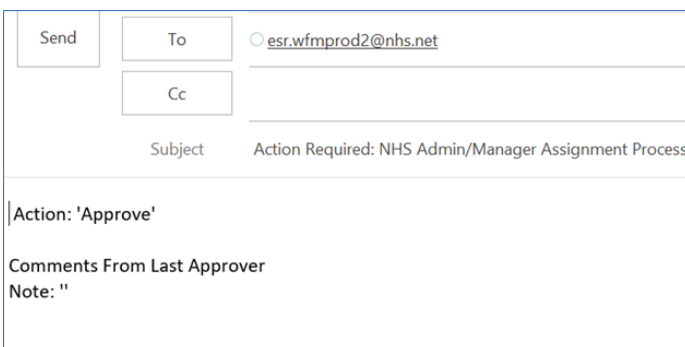
The email will come from ESR and will detail the change within the email.



If you can approve the change via email, it will display links to do so, you can Approve by clicking the link or Return for Correction.

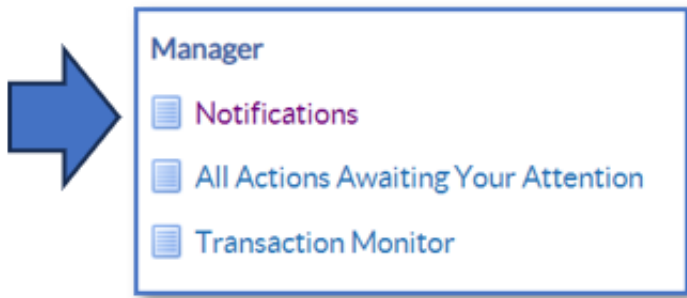


When you click the link, an email will open, it will auto fill your option. You can add comments if you wish then you'd click send.



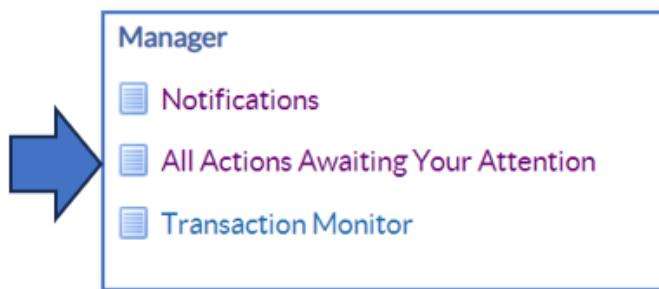
Once you have sent the email, it will approve the change in ESR and will flow to the next Approver or Payroll.

You can also access your manager notifications in your main menu for Manager Self Service, from the main menu, in the Manager section click Notifications.



You'll see your notifications in the Worklist.

As an Approver, it may be best to check the “All Actions Awaiting Your Attention” are of Manager Self Service.



You can see any transactions that require approval here.

| All Actions Awaiting Your Attention   |             |                   |                   |                            |  |                |                  |        |        |
|---|-------------|-------------------|-------------------|----------------------------|--|----------------|------------------|--------|--------|
| Subject   | Sent        | Name              | Assignment Number | Organisation               | Job  | Effective Date | Status           | Update | Delete |
| NHS Admin/Manager End Employment Process for Jimenes29, Miss Monica (forwarded to SSHR Payroll Approvals) | 12-Jan-2023 | Jimenes29, Monica | 20020847          | 517 Ward 10                | Nursing and Midwifery Registered Staff Nurse | 12-Jan-2023    | Pending Approval |        |        |
| NHS Admin/Manager Assignment Process for Joshi29, Mrs. Neela (forwarded to SSHR Payroll Approvals)        | 12-Jan-2023 | Joshi29, Neela    | 20020907          | 517 Ward 10                | Nursing and Midwifery Registered Staff Nurse | 15-Jan-2023    | Pending Approval |        |        |
| NHS Change Hours Process for Admin29, Anthony (forwarded to SSHR Payroll Approvals)                       | 12-Jan-2023 | Admin29, Anthony  | 20020487          | 517 Acute Nurse Management | Administrative and Clerical Clerical Worker  | 12-Jan-2023    | Pending Approval |        |        |

Click into the notifications to view the change form, this can be a Change of Hours, Change of Assignment or End Employment.

Worklist - NHS Admin/Manager Assignment Process for

From: [ ] To: [ ] Sent: [ ] ID: [ ] Attachments: [ ]

Summary

Effective Date: 01-Nov-2023

Employee Name: [ ] Employee Number: [ ] Job: Administrative Clerk/Officer

Organization: [ ] Organization Email Address: [ ] Supervisor: [ ]

Indicate Change Item

Assignment

|                     | Current                          | Proposed                         |
|---------------------|----------------------------------|----------------------------------|
| Department          | [ ]                              | [ ]                              |
| Job                 | [ ]                              | [ ]                              |
| Worker is a Manager | [ ]                              | [ ]                              |
| Position Name       | [ ]                              | [ ]                              |
| Working At Home     | No                               | Yes                              |
| Location            | 156 12 RCH                       | 156 12 RCH                       |
| Grade Name          | NP5(X)ND4/Non Review Body Band 4 | NP5(X)ND4/Non Review Body Band 4 |
| Grade Point         | 250                              | 250                              |
| Grade Step          | 7                                | 7                                |
| Payscale Name       | 154 Monthly                      | 154 Monthly                      |
| Payscale            | Default Home                     | Default Home                     |
| Assignment Status   | Active Assignment                | Internal Secondment              |
| Change Reason       | [ ]                              | Covering Career Break            |

You will see the details of the change form, along with the options to Approve or Return for Correction.

If you click Approve it will approve the change in ESR and will flow to the next Approver or Payroll.

If you click Return for Correction, it will flow back to the individual that started the transaction.

You can check the progress of transactions here in Transaction Monitor.

**Manager**

- Notifications
- All Actions Awaiting Your Attention
- Transaction Monitor

Transaction Monitor

Function Name: [ ]

Transaction Initiator: Leese22, Mrs. Vivian

Transaction Created For: [ ]





From Date: [ ]

To Date: [ ]

\* Transaction Status: Pending Approval

Go Clear

You can search in different ways. If you click Go, it will bring up all transactions that are Pending Approval.

| Transaction Initiator | Creation Date | Transaction Created For | Function Name                         | Transaction Details   |
|-----------------------|---------------|-------------------------|---------------------------------------|---|
| Leese22, Vivian       | 18-Oct-2023   | Admin22, Anthony        | NHS Manager End Employment (Approval) |  |
| Leese22, Vivian       | 18-Oct-2023   | Joshi22, Neela          | NHS Manager Assignment (Approval)     |  |
| Leese22, Vivian       | 16-Oct-2023   | Nelson22, Art           | NHS Manager Assignment (Approval)     |  |
| Leese22, Vivian       | 16-Oct-2023   | Johnson22, Andrew       | NHS Manager Assignment (Approval)     |  |


Click in the Transaction Details column against the employee you wish to check.

**Summary**  
**Effective Date 18-Oct-2023**

|                 |   |                            |                            |
|-----------------|---|----------------------------|----------------------------|
| Employee Name   | Admin22, Anthony                            | Organisation               | 505 Acute Nurse Management |
| Employee Number | 20006948                                    | Organization Email Address |                            |
| Job             | Administrative and Clerical Clerical Worker | Supervisor                 | Leese22, Vivian            |

Indicates Changed Items.

**Reassigned Direct Reports**

| Worker Name     | Job  | Current Manager Name | Proposed Manager Name  | Effective Transfer Date |
|-----------------|--|----------------------|--|-------------------------|
| Senior22, Simon | Nursing and Midwifery Registered Specialist Nurse Practitioner | Admin22, Anthony     | Admin03, Anthony  | 01-Dec-2023             |

**Termination Details**

|                                    |  |
|------------------------------------|--|
| Termination Date                   | 30-Nov-2023  |
| Notification Date                  | 18-Oct-2023  |
| Reason                             | Voluntary Resignation - Promotion                                  |
| Comments                           | Please pay 5 hours annual leave that was not taken before leaving. |
| Rehire                             |  |
| Last Working Day                   | 30-Nov-2023  |
| Destination On Leaving             | NHS Organisation   |
| NHS Organisation                   | 418 Bedfordshire Hospitals NHS Foundation Trust                    |
| Available For Bank                 | <small>418</small>   |
| Termination Notification Sent Date |  |
| Exit Reference Completed           |  |
| Removal Requested                  |  |
| Hold Record                        |  |
| Hold Reason                        |  |

**Attachment(s)**

**Action History**

| Sequence | Name                       | Action  | Date                 | Notes |
|----------|----------------------------|---------|----------------------|-------|
| 1        | Leese22, Vivian            | Submit  | 18-Oct-2023 17:38:52 |       |
| 2        | Leese22, Vivian            | Forward | 18-Oct-2023 17:43:03 |       |
| 3        | SSHR Payroll Approvals 501 | Pending |                      |       |

[Return to Transaction Monitor](#)

You can see in this screen the details of the change and the audit trail.

Click Return to Transaction Monitor to go back.

If you need any assistance with Transactions that are not moving along the Approval chain, please contact ESR Support for assistance.

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

- MSS35 : My ESR Manager
- MSS01 : How do I manage my notifications?
- MSS03 : How do I view and action my email notifications?
- MSS02 : How do I create vacation rules and grant worklist access?
- MSS38 : How do I manage Proxy Users?

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

Please contact the ESR Team for support in using Manager Self Service:  
[rcht.esrsupportteam@nhs.net](mailto:rcht.esrsupportteam@nhs.net)

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=396>