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.

Send	То	esr.wfmprod2@nhs.net
	Cc	
	Subject	Action Required: NHS Admin/Manager Assignment Process
Action: 'App	prove'	
Comments F Note: ''	From Last Appro	over

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	Status 🗠	Update	Dele
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	0	0
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	0	0
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	0	8
¢										

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

Werklat - NHS Admin/Manager Assignment Process fo	л ^г	Approve Reject Reasing Repart Information
From To Set 10 Summary	Attachments	
Effective Date 01 Nov-2023 Employes Name Employes Namber Job Ade Solares Orepitans Assignment	inineaturado CuricatiOttour	Organization Organization Email Address Supervisor
	al anna	
	Carrent	Proposed
Department		
Worker is a Manage		
Historia Italia		No
mortung Ac Provide		
Lado	126 12 MUM	100 12 KUM
Gran Nam	neto, Ankarijnejn Ravnew Doby Danie 4	hertsjunkjikipisjin kevnew body band 4
Grade Fort	3	1
Paral Nati	15.4 Monthly	154 Monthly
Parosin	Certault Home	Default Home
Assignment Statu	Active Assignment	Internal Secondment
Come Barrow		Covering Career Break a

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.





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 Detail
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	e Nurse Management
Employee Number	20006948	Organizatio	on Email Address	
Job	Administrative and Clerical Clerical Worker		Supervisor Leese22, V	Vivian
Indicates Changed Items.				
Reassigned Direct Reports				
Worker Name Job		Current Manager Name	Proposed Manager Name	Effective Transfer Date
Senior22, Simon Nursing and Midwifery Re	gistered Specialist Nurse Practitioner	Admin22, Anthony	Admin03, Anthony 👩	01-Dec-2023
Termination Details				
	Termination Date 30-Nov-2023			
	Notification Date 18-Oct-2023			
	Reason Voluntary Resi	ignation - Promotion		
	Comments Please pay 5 ho	ours annual leave that was not ta	ken before leaving.	
	Rehire			
	Last Working Day 30-Nov-2023			
De	stination On Leaving NHS Organisal	tion		
	NHS Organisation 418 Bedfordsh	nire Hospitals NHS Foundation Tr	rust	
	418			
	Available For Bank			
Termination	lotification Sent Date			
Exit	Reference Completed			
	Removal Requested			
	Hold Record			
	Hold Reason			
Attachment(s)				
Action History				
Sequence Name	Action [Date	Notes	
1 Leese22, Vivian	Submit 1	18-Oct-2023 17:38:52		
2 Leese22, Vivian	Forward 1	18-Oct-2023 17:43:03		
3 SSHR Payroll Approvals 50	1 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: <u>rcht.esrsupportteam@nhs.net</u>

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