

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.

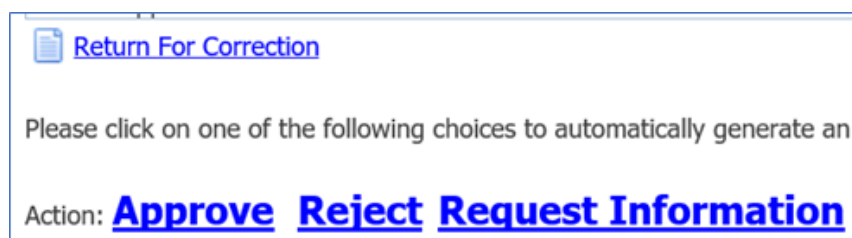


The email will come from ESR and will detail the change within the email.

PROD Workflow Mailer

Action Required: NHS Admin/Manager Assignment Process .

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.

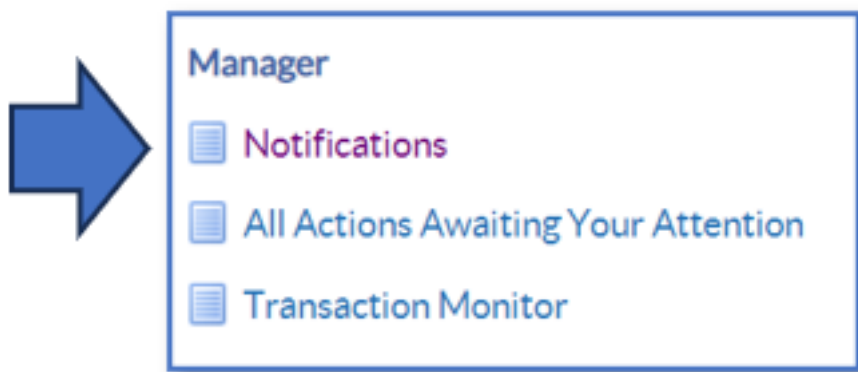


When you click the link, an email will open, it will auto fill your option. You can add comments if you wish then you'd click send.

Send	To	esr.wfmprod2@nhs.net
	Cc	
Subject		Action Required: NHS Admin/Manager Assignment Process
Action: 'Approve' Comments From Last Approver Note: "		

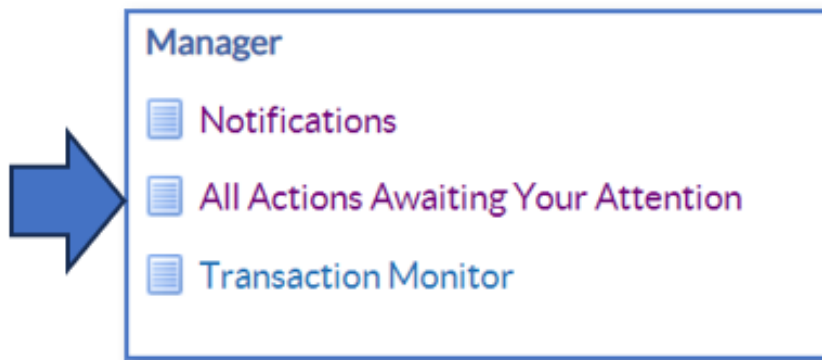
Once you have sent the email, it will approve the change in ESR and will flow to the next Approver or Payroll.

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.

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.

Workflow > NHS Admin/Manager Assignment Process for

Approve Reject Reassign Request Information

From: To: Sent: ID: Attachments:

Summary

Effective Date 01-Nov-2023

Employee Name: Employee Number: Job: Administrative and Clerical Officer

Organisation: Organization Email Address: Supervisor

Initiate Change Item

Assignments

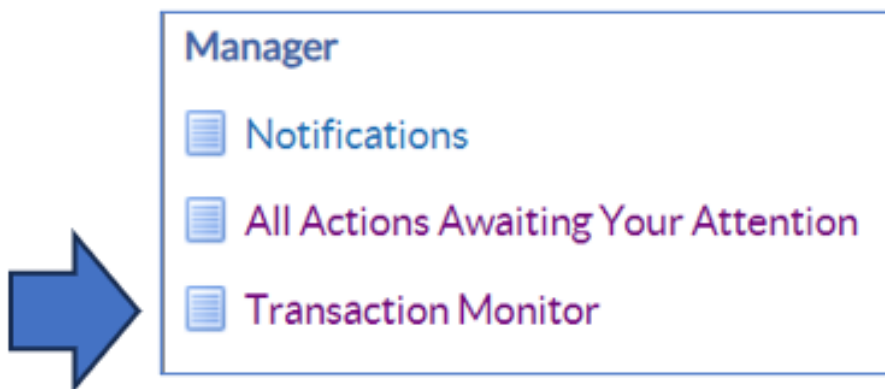
Current	Proposed
Department	
Job	
Worker is a Manager	
Position Name	
Working At Home	No
Location	156 12 RCH
Grade Name	NHS(XND4)Non Review Body Band 4
Grade Point	250
Grade Step	7
Payroll Name	156 Monthly
Paypoint	Default Home
Assignment Status	Active Assignment
Change Reason	Covering Career Break

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.

A screenshot of the "Transaction Monitor" search form. It includes fields for "Function Name", "Transaction Initiator" (pre-filled with "Leese22, Mrs. Vivian"), "Transaction Created For", "From Date", "To Date", and "Transaction Status" (pre-filled with "Pending Approval"). There are "Go" and "Clear" buttons at the bottom. A large blue arrow points upwards towards the "Go" button.

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 NameAdmin22, Anthony

Employee Number20006948

JobAdministrative and Clerical|Clerical Worker

Organisation505 Acute Nurse Management

Organization Email Address

SupervisorLeese22, 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 Date30-Nov-2023

Notification Date18-Oct-2023

ReasonVoluntary Resignation - Promotion

CommentsPlease pay 5 hours annual leave that was not taken before leaving.

Rehire

Last Working Day30-Nov-2023

Destination On LeavingNHS Organisation

NHS Organisation418 Bedfordshire Hospitals NHS Foundation Trust

Available For Bank

Termination Notification Sent Date

Exit Reference Completed

Removal Requested

Hold Record

Hold Reason

Attachment(s)

Action History

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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

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