Administrator Self Service – Assignment Changes

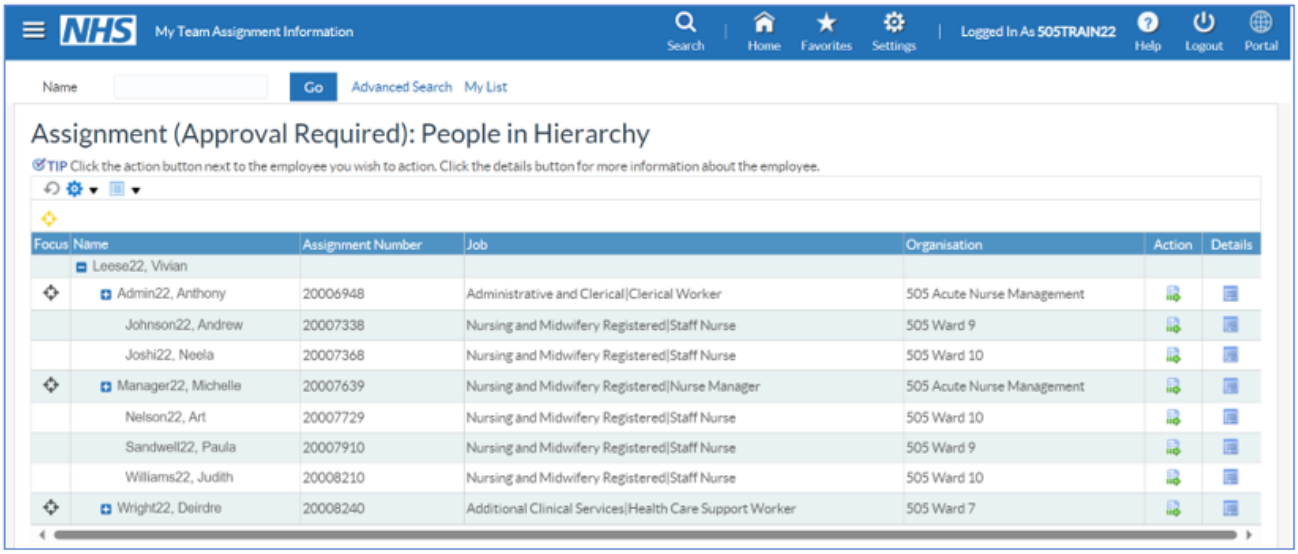
From the main menu, click Administer Assignment (Approval Required).

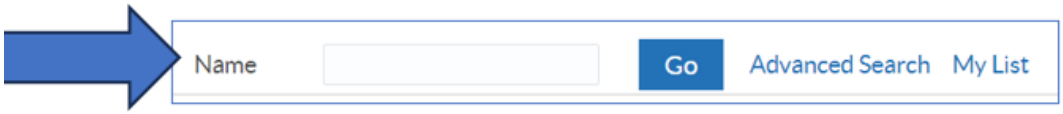
Supervisor Hierarchy

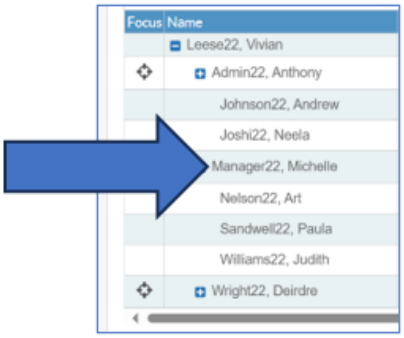
You'll need to select the employee in your Supervisor Hierarchy.

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.



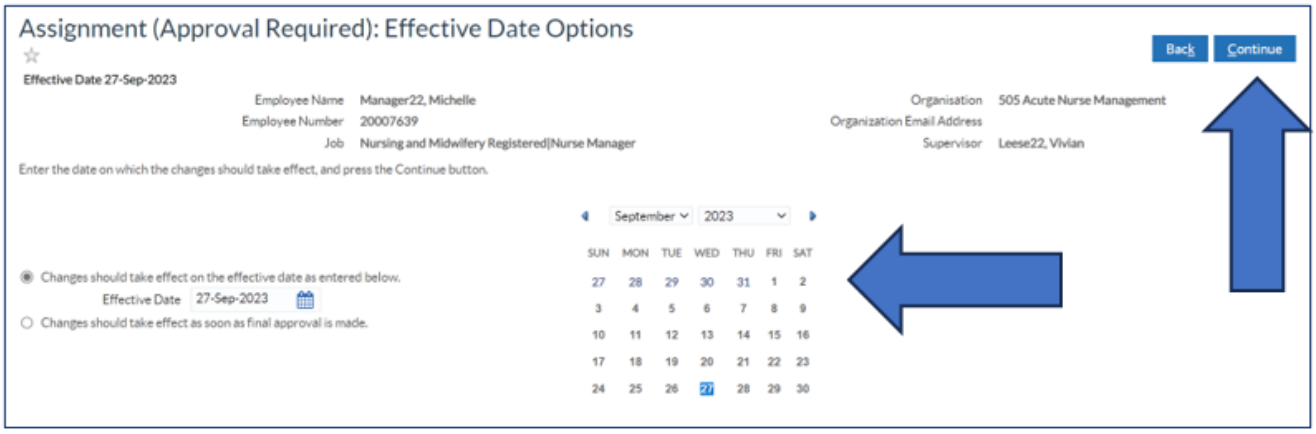




Effective Date

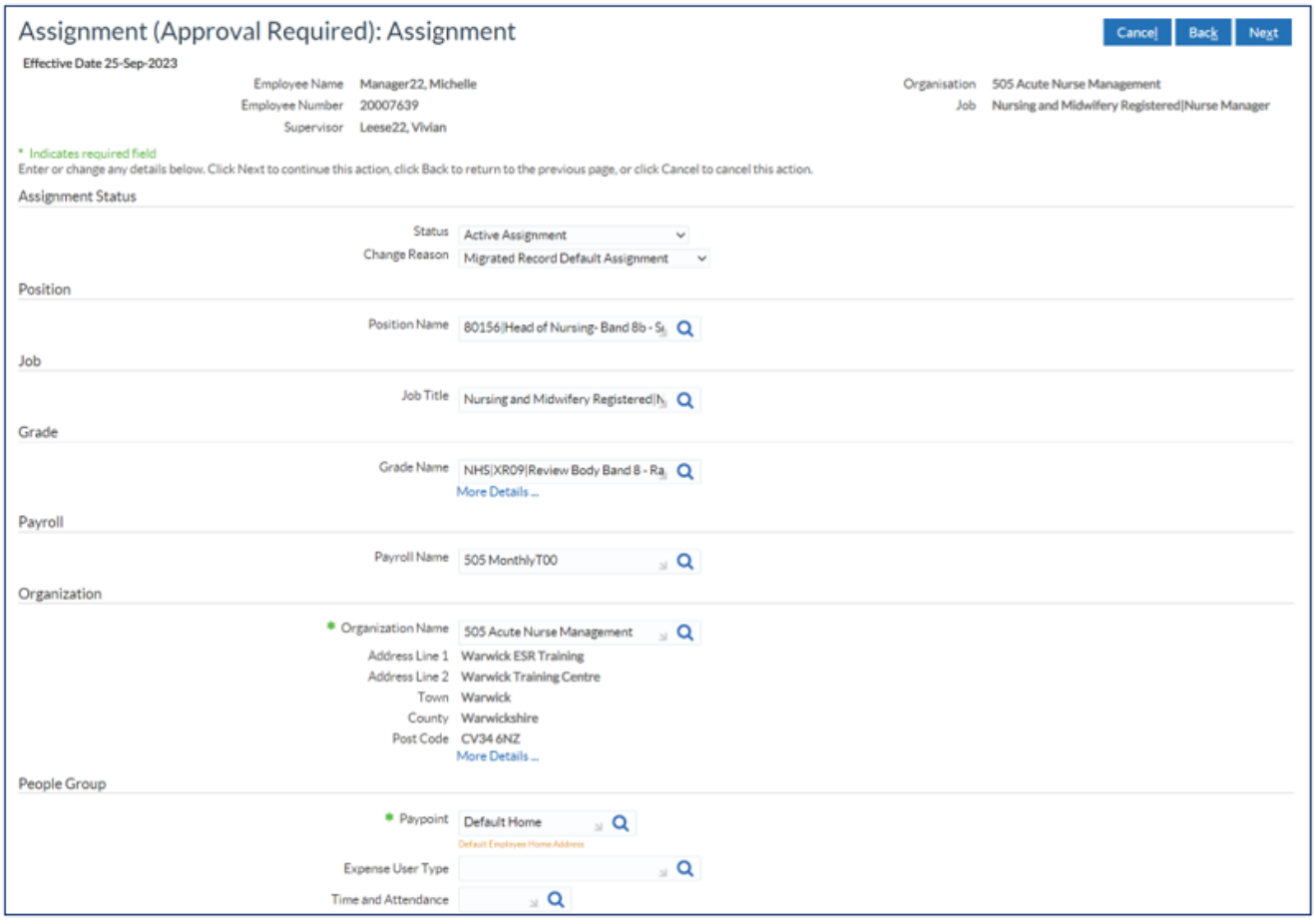
Next choose an effective date using either the calendar or typing in the date. Always use the effective date option.

Once set click Continue.



Assignment Form

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



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 Administrator 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.

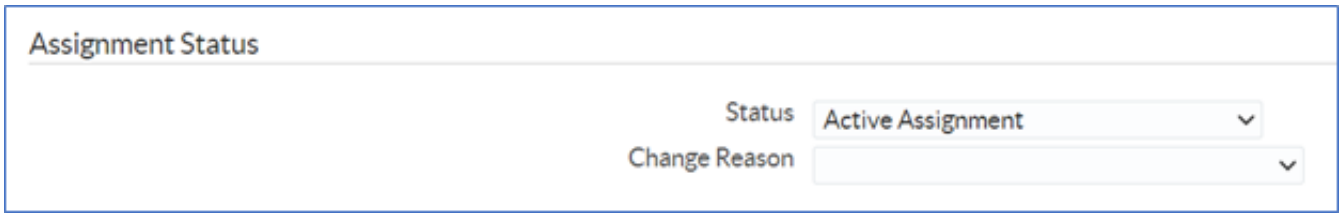
Please contact the ESR Support Team or Recruitment if you are unsure and would like to check before carrying out an Assignment Change in Administrator Self Service.

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

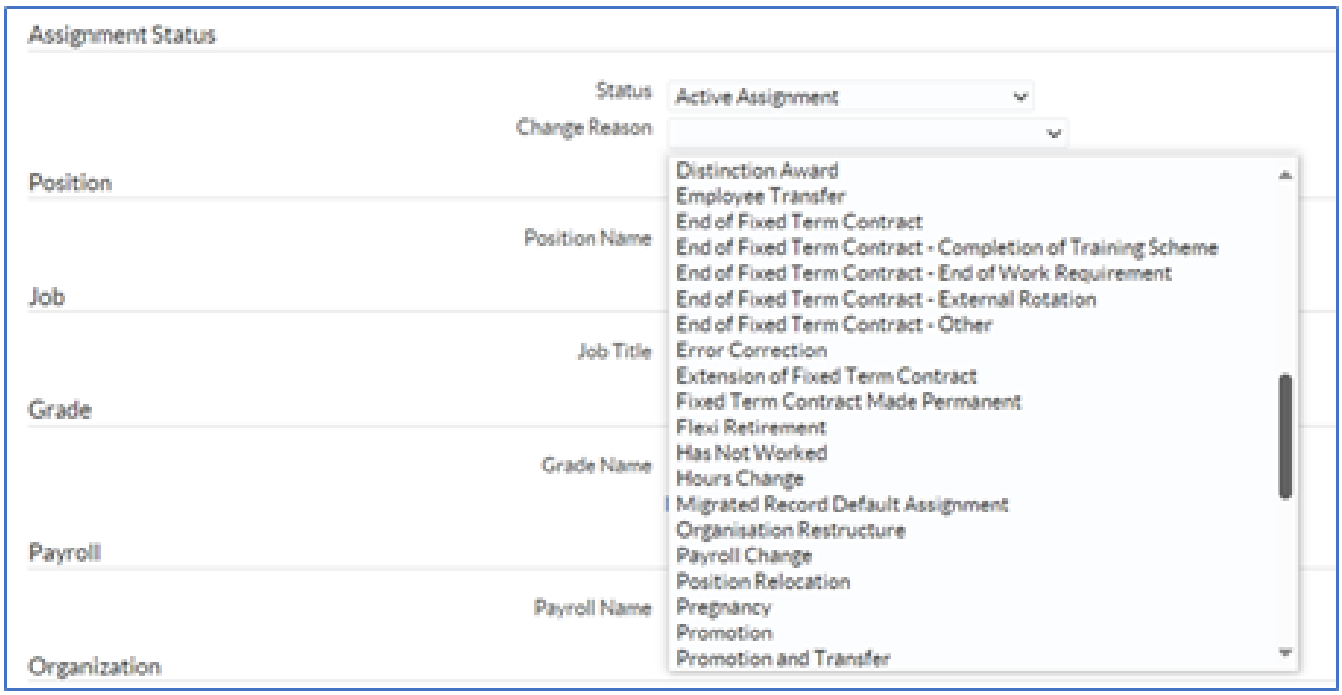
Assignment Status



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.

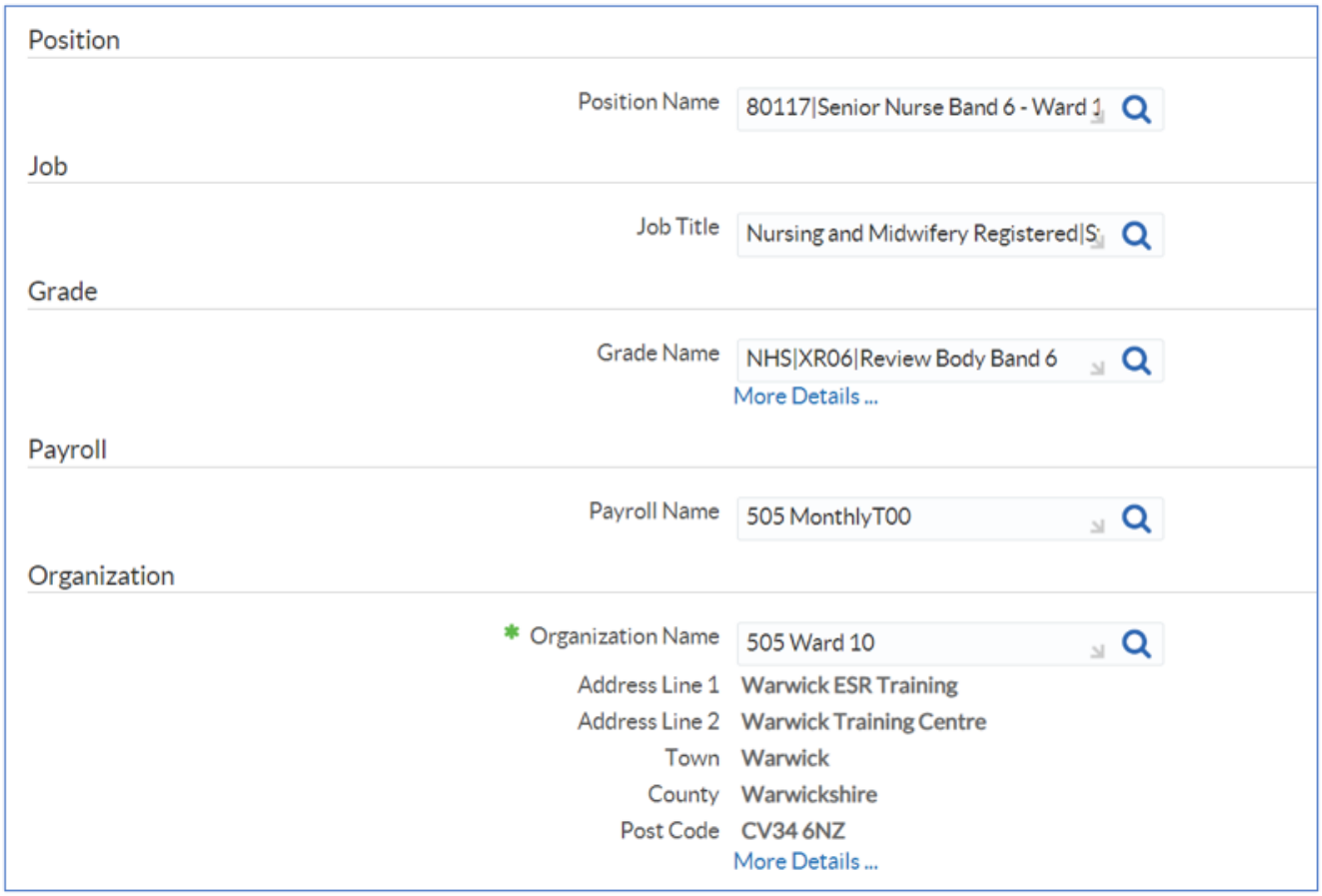


Position / Job / Grade / Payroll & Organisation

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.



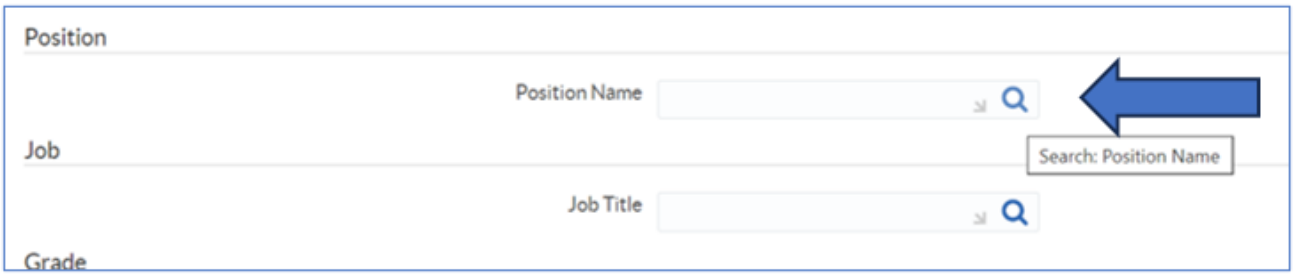
If you need to change the job details, grade, or department then you will need to do so by searching for the Position number.

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

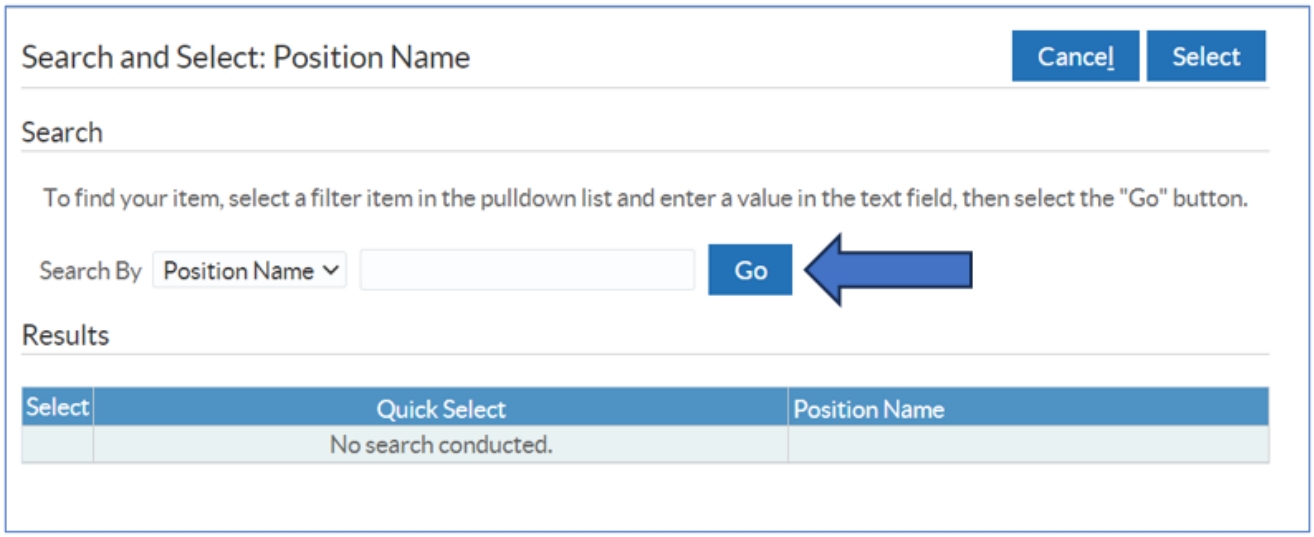
Finding a new Position within the same department

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.

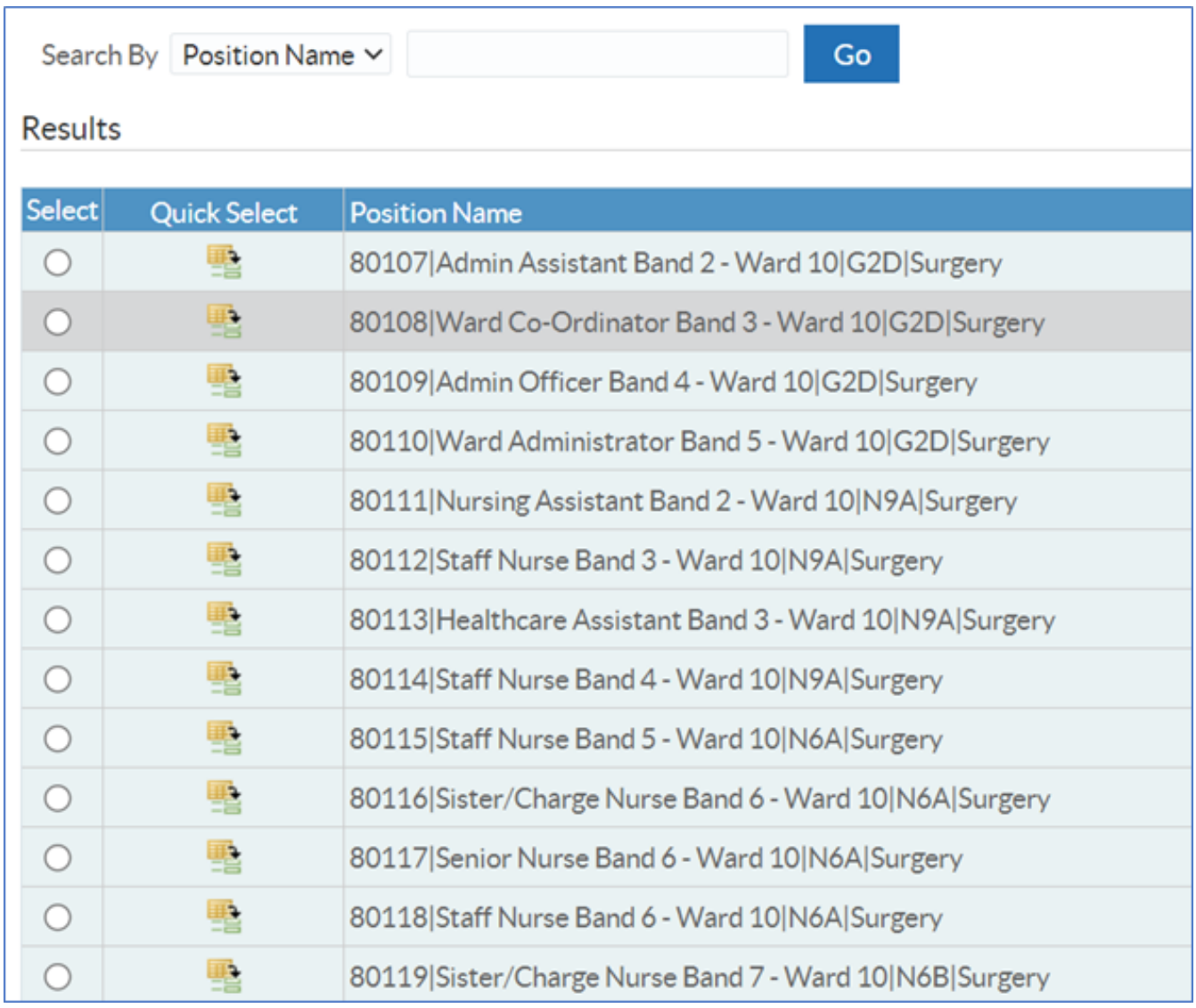
Once you have removed the current details, you can search for the new Position. Click on the search icon in the Position Name field.



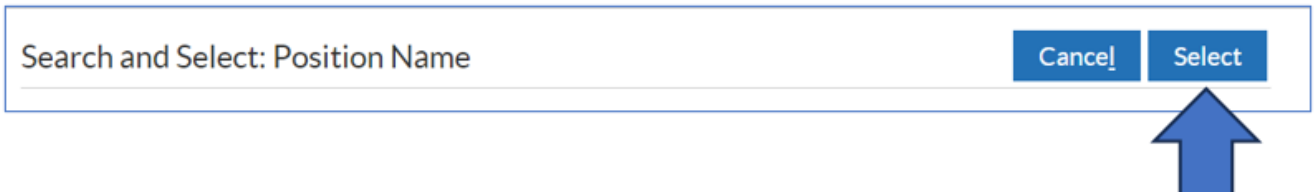
A search box will pop up, click Go.



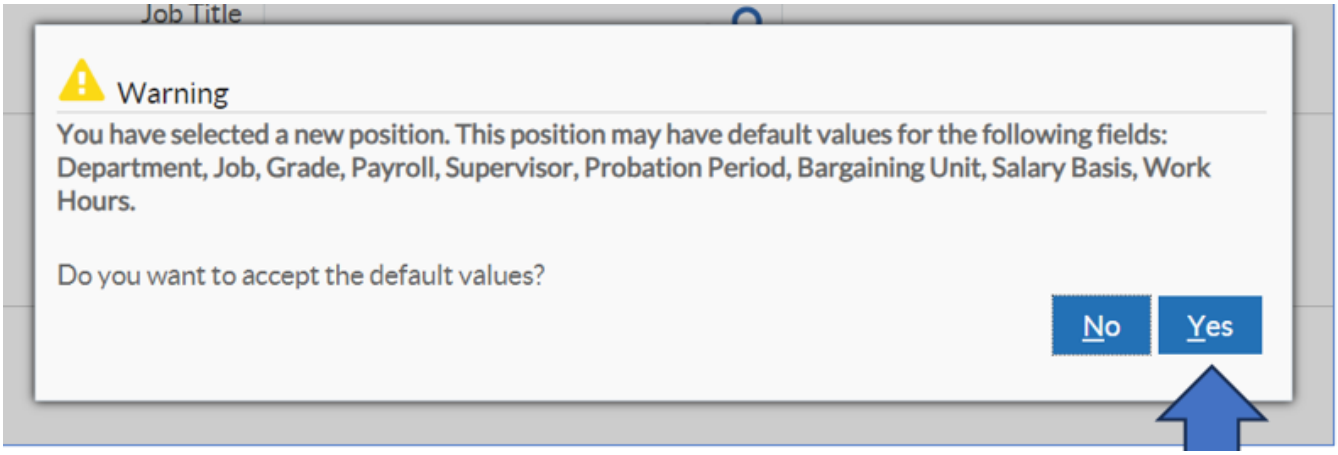
You will then see a list of the available positions in the department.



Pick the correct position and click select.

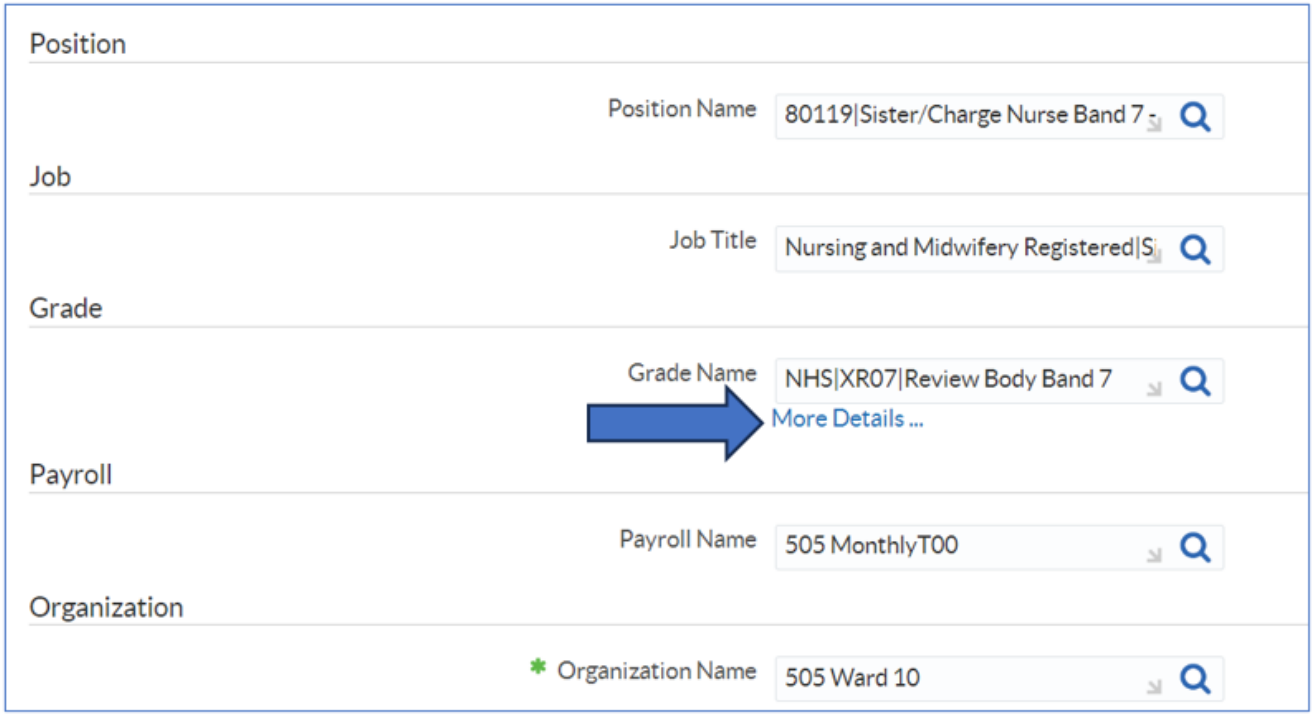


The pop-up screen will close, and you will see a warning message.



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.



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.

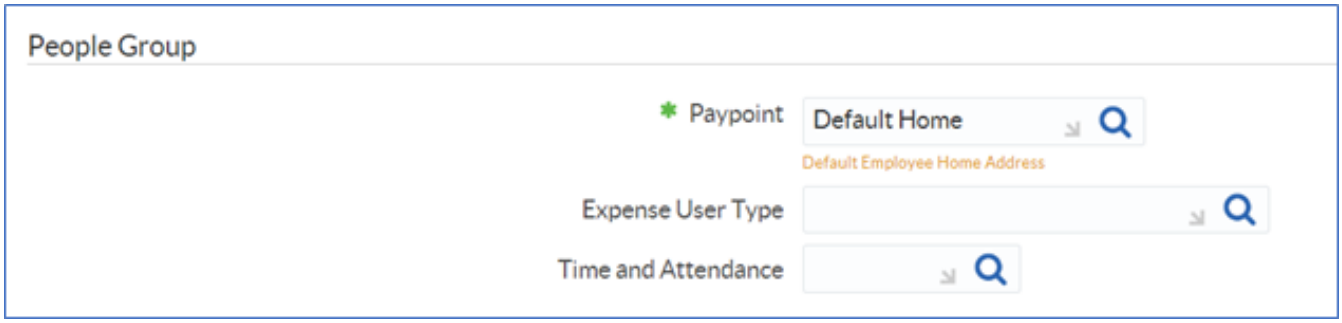
You can advise the salary later in the form.

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

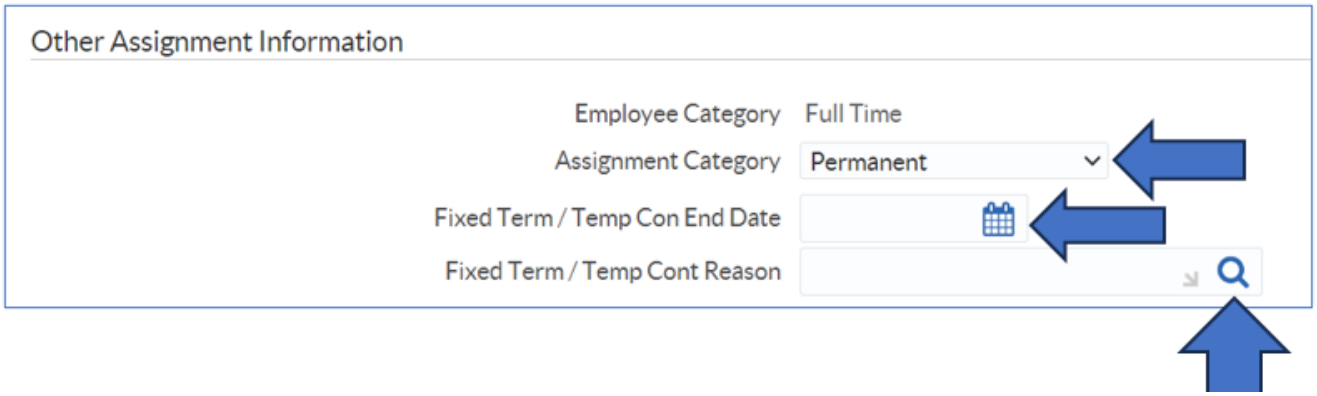
Do not update this section. RCHT Payroll Department maintain this section in ESR.



Other Assignment Information

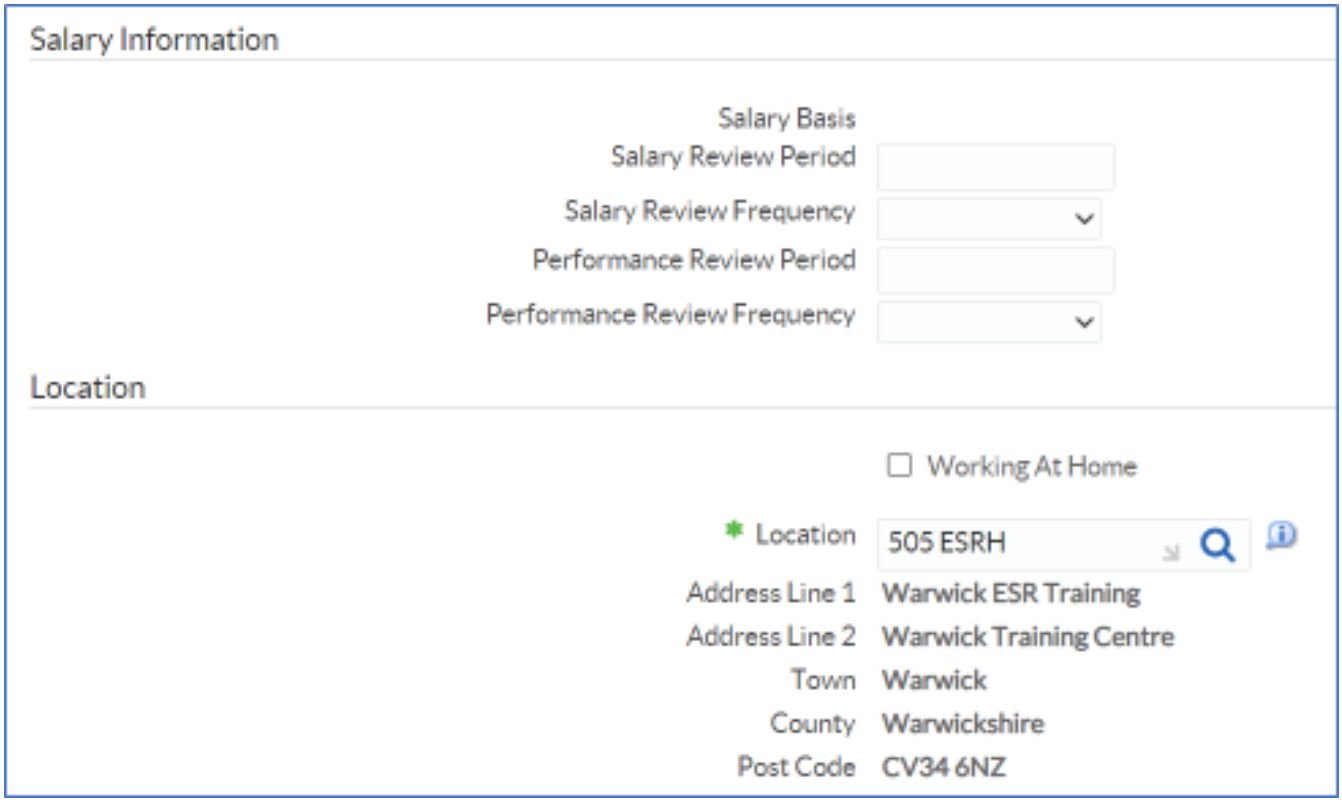
In this section you can update the Assignment Category, Fixed Term end dates and Fixed Term Reasons.

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



Salary Information & Location

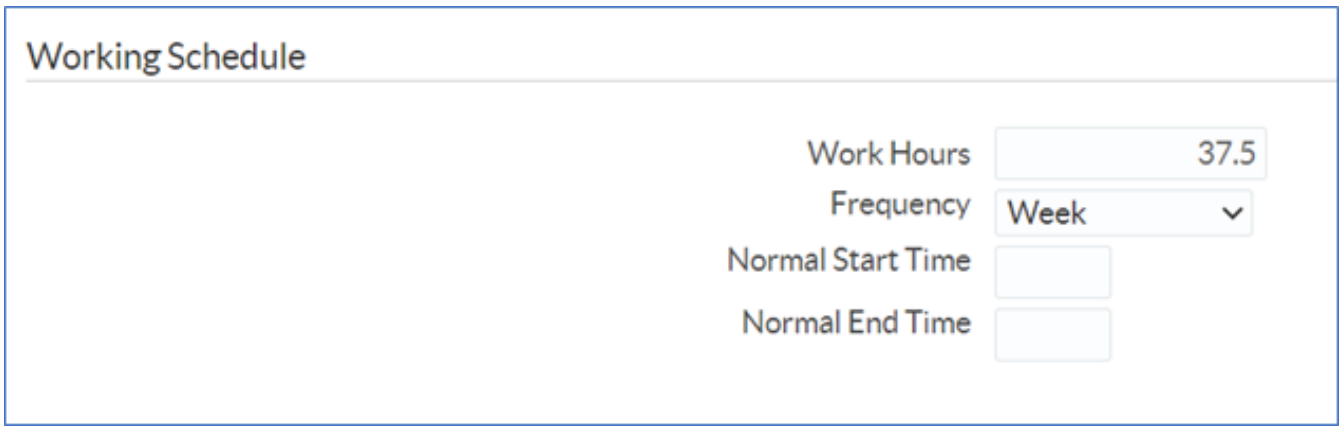
You do not need to update anything in these sections.



Working Schedule

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

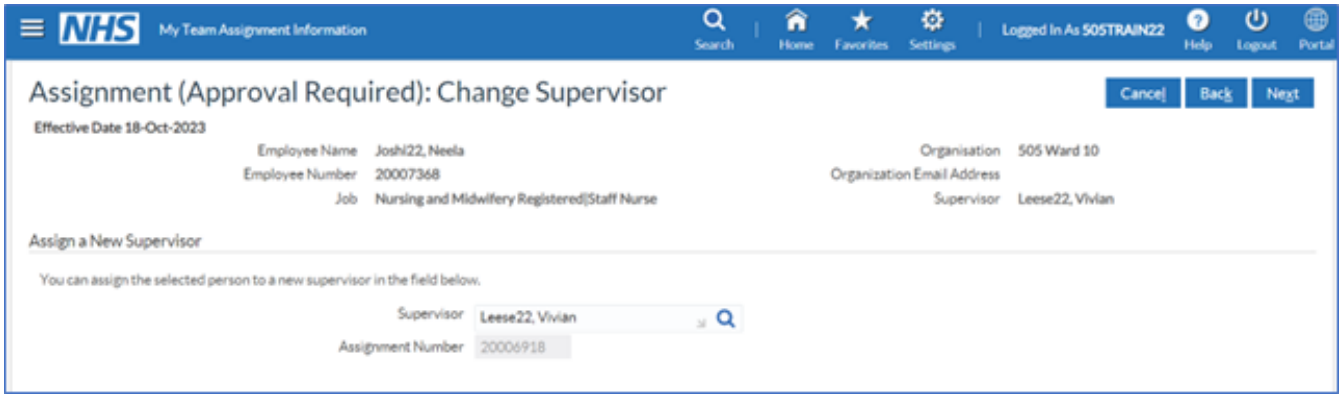
Do not update Frequency, start, or end times.



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.

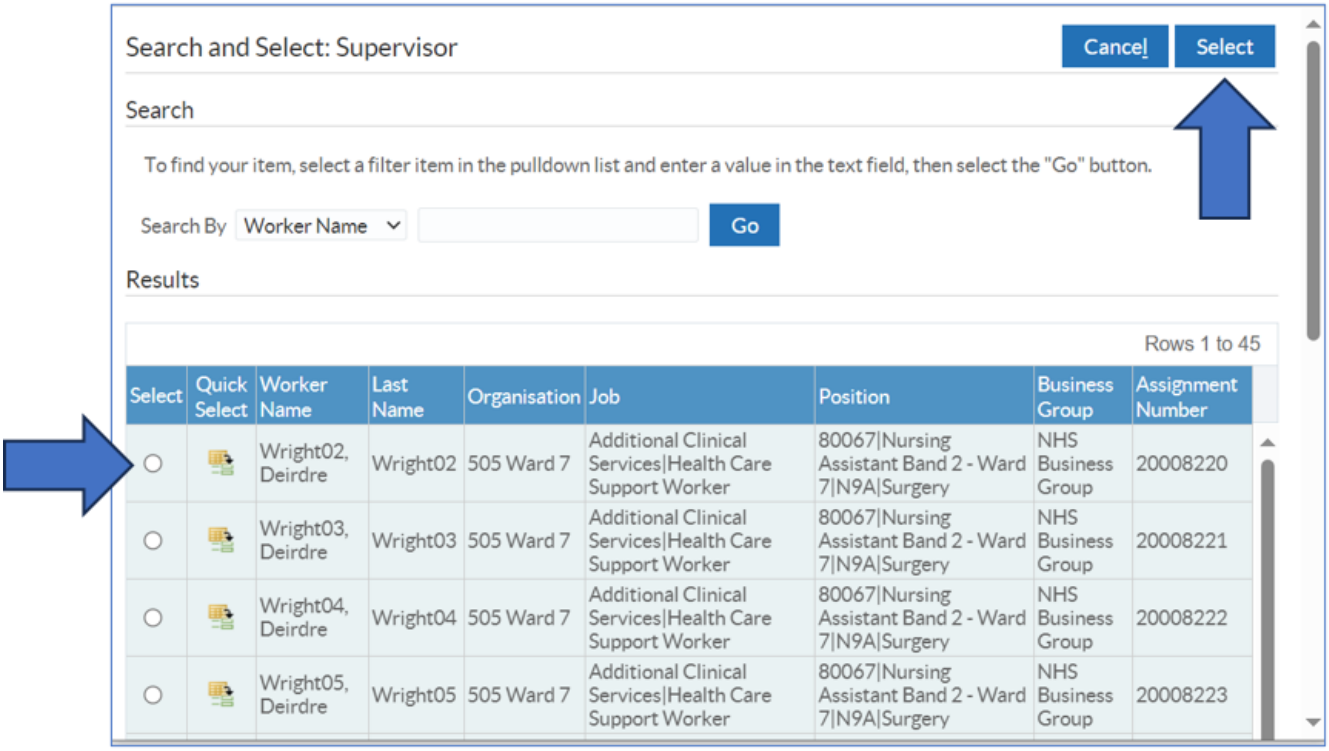


You can search for the new supervisor with the search icon in the "Assign

New Supervisor" section.

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.

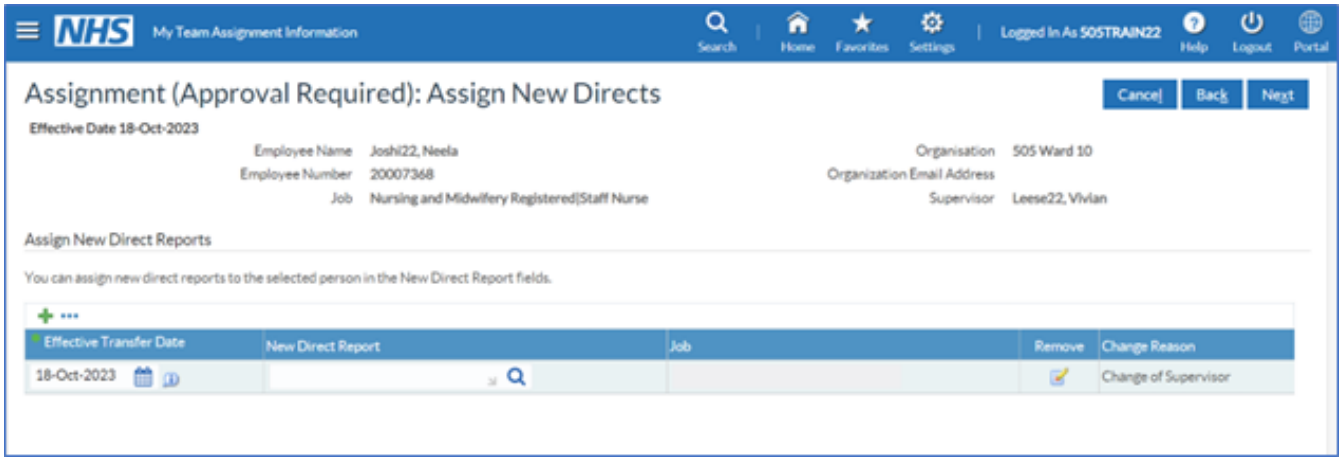


Your new supervisor will now show in the main screen.

Click Next when ready.

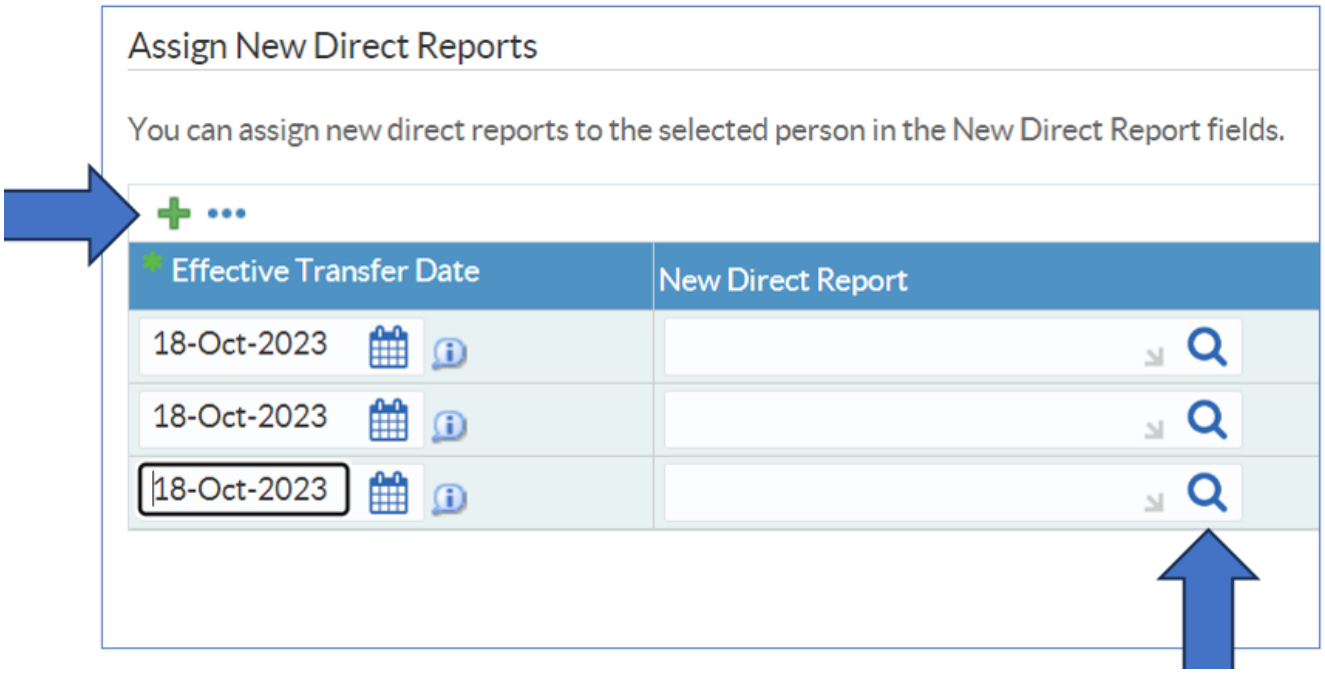
Direct Reports

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

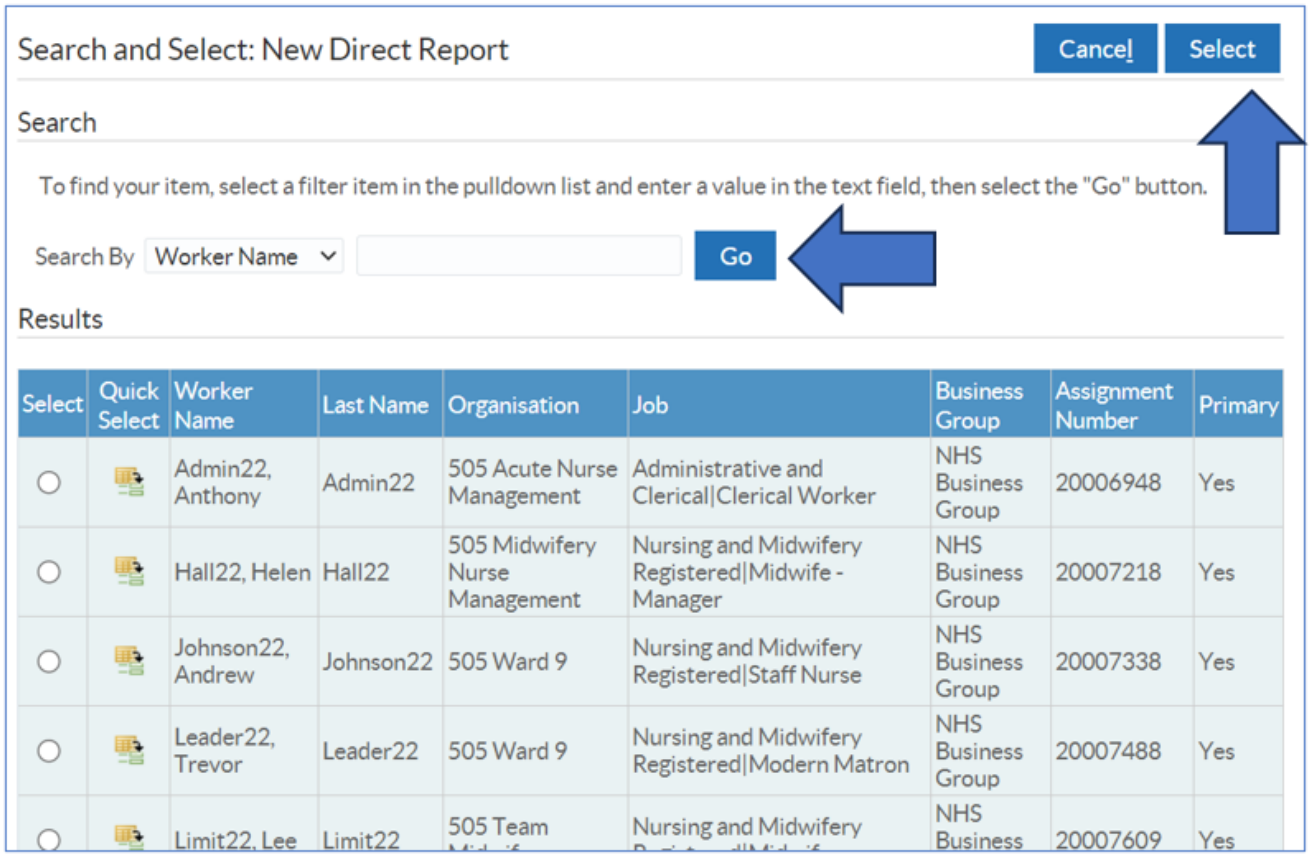


You can click on the green plus sign if you need to add more than one.

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

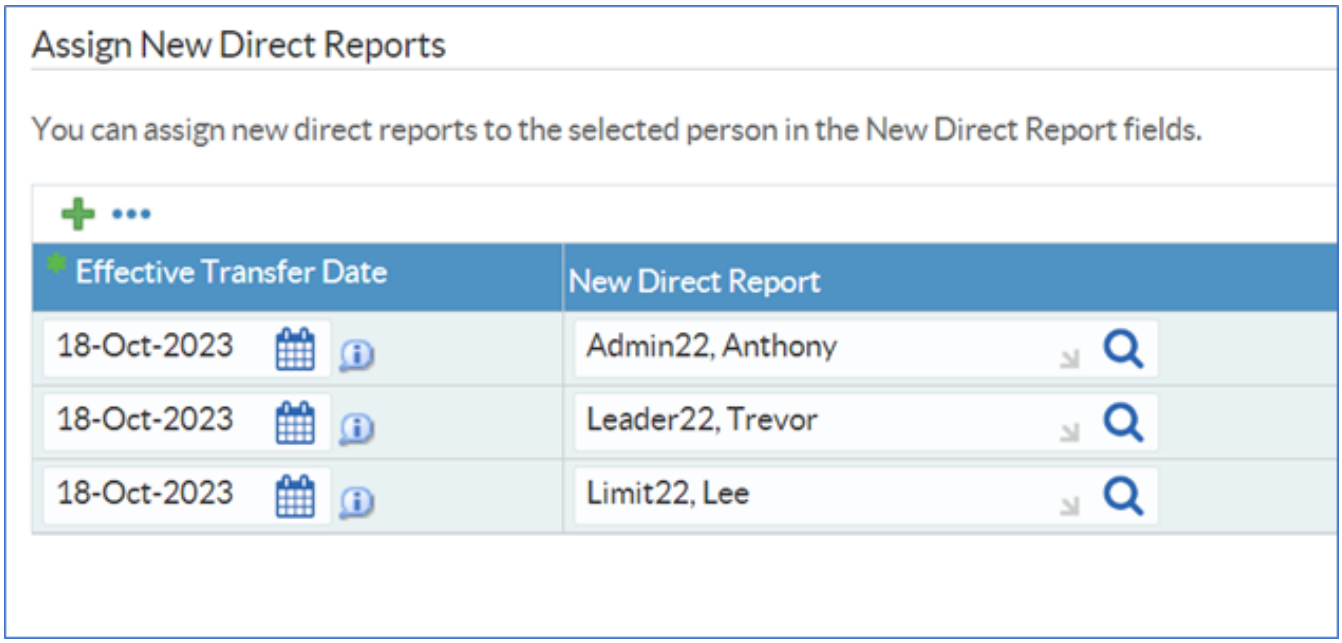


You'll need to search and select for each row.



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

When you and pick the right name, click Select.

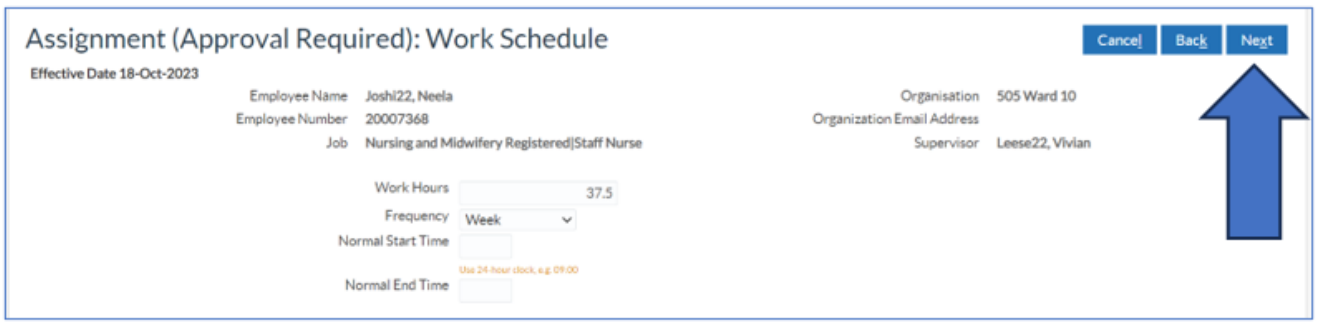


Once you have added all the new direct reports, click Next.

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 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

Cancel | Printable Page | Back | Submit

Effective Date 18-Oct-2023

Employee Name Joshi22, Neela
Employee Number 20007368
Job Nursing and Midwifery Registered|Staff Nurse
Organisation 505 Ward 10
Organization 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 10|N6A|Surgery	80119|Sister/Charge Nurse Band 7 - Ward 10|N6B|Surgery
Location	505 ESRH	505 ESRH
Grade Name	NHS|XR06|Review Body Band 6	NHS|XR07|Review Body Band 7
Grade Point	320	330
Grade Step	4	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
No. 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
No. of Increments	1	1

New Supervisor

Worker Name	Current Supervisor Name	Proposed Supervisor Name	Effective Transfer Date
Joshi22, Neela	Leese22, Vivian	Wright02, Deirdre	18-Oct-2023

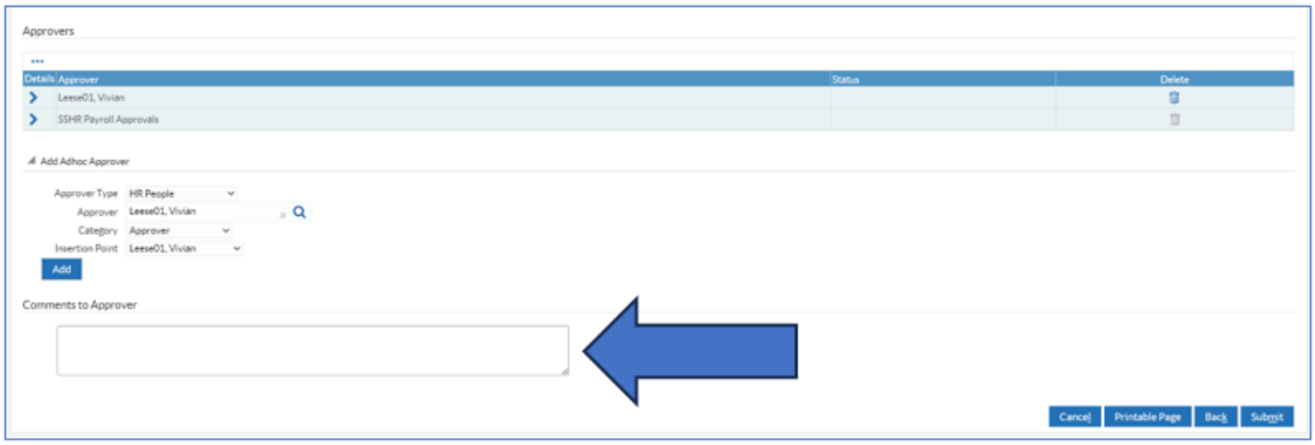
New Direct Reports

Worker Name	Job	Current Supervisor Name	Proposed Supervisor Name	Effective Transfer Date
Limit22, Lee	Nursing and Midwifery Registered|Midwife	Hall22, Helen	Joshi22, Neela	18-Oct-2023
Leader22, Trevor	Nursing and Midwifery Registered|Modern Matron	Manager22, Michelle	Joshi22, Neela	18-Oct-2023
Admin22, Anthony	Administrative and Clerical|Clerical Worker	Leese22, Vivian	Joshi22, Neela	18-Oct-2023

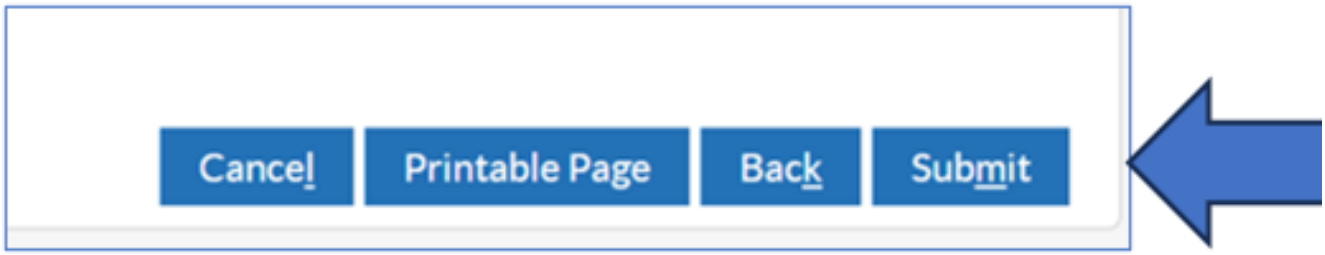
When you have checked your changes, scroll down to the next section.

Comments & Submit Change

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

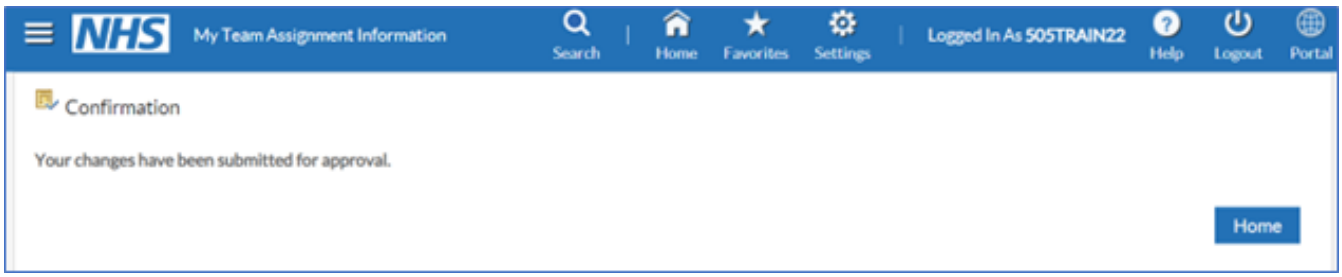


When ready Click Submit.

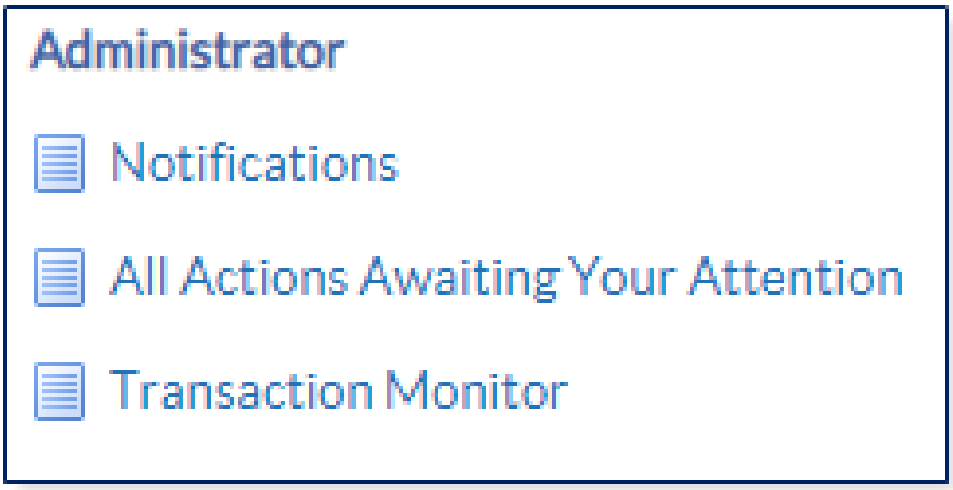


You'll see a confirmation screen, so you can see that the changes have now been submitted for Approval then onto Payroll.

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



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



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 Administrator 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 Administrator Self Service: rcht.esrsupportteam@nhs.net

Online URL: https://elearning.cornwall.nhs.uk/site/kb/article.php?id=407