

ESR Manager/Admin Self Service – Frequently Asked Questions V1

Manager/Admin Self Service gives you direct access to information held in ESR and the ability to update information for the employees within your team. Please use this document as a guide for any frequently asked questions. If you cannot find a solution to your query, please contact the ESR Support Team via email: rcht.esrsupportteam@nhs.net

Additional training and step by step guides can be found here: [Managers Self Service - Introduction \(cornwall.nhs.uk\)](#)

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ESR Manager/Admin Self Service – Smartcards & Accessing Manager/Admin Self Service

Q: I don't have a smartcard. How do I request one?

A: You can request a smartcard from the CITS team. You'll need one to access Manager and Admin Self Service. You can contact the CITS team via phone or email, as well as via the link below:

Smartcards - [Requesting a Smartcard for the First Time \(sma247.com\)](#)

Q: My Smartcard is locked. How do I unlock it?

A: The CITS team can assist in unlocking your card. This can be done via the link below:

[Smartcard - Reset / unlock information \(sma247.com\)](http://sma247.com)

Q: How do I Connect my Smartcard to my computer?

A: Most trust-allocated laptops will have a slot down the left-hand side, down from where you plug in your charger. If you have a desktop computer, most trust-allocated keyboards will have a card slot along the top. If you do not have either of these, you'll need to request a smartcard reader from the CITS team. Insert your card, and your computer will request your smartcard password automatically. Once this has been entered, you are ready to use your smartcard.

Q: I'm using my smartcard for the first time, what do I need to do?

A: When you insert your smartcard for the first time, you'll need to enter and set your passcode. These will have been given along with instructions to you by the CITS team with your card. Enter these details when requested on screen and accept the terms and conditions at the bottom of the screen. You have now linked your card to your ESR account.

For any issues, contact CITS: [Smartcard - Reset / unlock information \(sma247.com\)](http://sma247.com)

Q: I am a proxy user for a manager. Will I need a Smartcard?

A: This depends on whether the Manager assigning the proxy access is a smartcard user, as part of the Manager Self Service implementation, all managers and administrators given access will require a smartcard.

If you are going to be a Proxy to Admin SS or Manager SS, you will also need a smartcard.

ESR Manager/Admin Self Service – General Questions

Q: What is the difference between Manager Self Service and Admin Self Service?

A: Both levels of access are very similar and will allow you to access most of the features in the same way.

Manager Self Service is an increased level of access within ESR, following on from Supervisor Self Service. Giving managers access to further functionality, to improve processes such as Change of Hours, Assignment and Contract Changes, End of Employment and Flexible Working.

Administrator Self Service is very similar to Manager Self Service but any pay affecting changes initiated by Admin Self Service Users will need approval from an Approving Manager.

Q: Where do I find Manager / Admin Self Service in ESR?

Once you have logged into ESR using your smartcard (Click 'login with care identity' rather than using your username and password) you can access Manager / Admin Self Service two ways. Either by clicking on the tab at the top of ESR that says either 'manager' or 'admin,' or you can click on 'ESR Navigator' on the left-hand side and click on 'Manager / Admin Self Service.' A guide can be found on the training portal: [Managers Self Service - Introduction \(cornwall.nhs.uk\)](http://cornwall.nhs.uk)

Q: Where do I find my supervisor hierarchy?

A: At the top of your ESR page, click on the 'Manager' or 'Admin' tab. Down the left-hand side of the page there will be 'My Team Assignment Information.' Clicking this will open a drop-down menu. Clicking on 'Employment Information' will allow you to see your team. You can also view your team via the 'Launch Organisation Chart' portlet on your page. A guide can be found on the training portal: [Managers Self Service - Introduction \(cornwall.nhs.uk\)](http://cornwall.nhs.uk)

Q: I'm in Manager / Admin Self Service, I can't see my Appraisals?

A: To see your appraisals, you will still need to use Supervisor Self Service. You'll be able to quickly access this by clicking on '**156 Supervisor Self Service**' in the navigator on the left-hand side of the main menu.

Q: I'm new / returning to work and need access to Manager / Admin self Service. What do I need to do?

A: In the first instance, please contact the ESR Support team via email: rcht.esrsupportteam@nhs.net. This is so that we can check you are authorised by your care group to use Manager / Admin Self Service. It will also allow us to give you directions to the training portal and confirm if you have smartcard. Once training has been completed, and a smartcard issued to you by CITS, you will be granted the additional access.

Q: My ESR has timed out and clicking 'resume session' did not work.
If 'resume session' did not work, you will need to close all your internet browser windows, and re-open ESR.

Q: Can ARE forms be submitted via Manager / Admin Self Service?

A: No, please continue to use the existing form.

Q: I made an error in a Manager / Admin self service transaction, and then submitted it by mistake. How can I correct this?

A: Contact your approving manager and ask them to "return for correction". They will be able to send it back to you so that you can make the required changes. If you are unsure, please contact the ESR Support Team for Assistance. (rcht.esrsupportteam@nhs.net)

Q: I have a transaction to make but there is an error stopping me due to a "Future Dated Change". What do I do?

A: There are sometimes future dated changes already in ESR (for example another change to the assignment has been entered / processed by payroll, such as an increment due).

Please contact the ESR Support team to progress. (rcht.esrsupportteam@nhs.net).

Q: Midway through the approving process of a Manager / Admin Self Service transition, an error message has appeared advising me to reject the transaction. What Should I do?

A: There are numerous reasons that could cause this error (for example another change to the assignment has been entered / processed by payroll, such as an increment due). It's important for changes to go through as early as possible and quickly so that other changes do not interrupt the workflow. Please contact the ESR Support team to investigate. (rcht.esrsupportteam@nhs.net). Depending on the error, the transaction may need to be re-submitted.

ESR Manager/Admin Self Service – Change of Hours Questions

Q: Do I need to enter the Normal Start & End time when updating hours?

No, the only field to update when updating contracted hours is the work hours field. Do not update the other fields.

Q: How do I process a temporary change of hours, rather than permanent?

A: You would enter the hours change, the same way you'd enter a permanent hour change. However, you will need to change them back at the agreed date. Advise in the comments to Payroll, that it is a temporary change in hours and the dates, they will add a calendar reminder to ESR to flag when the temporary change is coming to an end.

If you would like to extend the temporary change, you can use the 'Assignment' functionality rather than 'Change of Hours' to advise Payroll.

You can enter a change reason (Payroll Change) and add comments.

Use the Guide: [Using the Assignment Form to advise other Payroll Changes](#).

ESR Manager/Admin Self Service – Change of Assignment Questions

Q: When should I submit an assignment change in Manager / Admin Self Service when it's related to a new hire?

A: If a member of staff is a new hire, or has been hired internally through

TRAC, there is no need to use Manager / Admin Self Service to change the assignment. This will be handled internally by recruitment. This avoids duplication of information / assignment changes.

Q: Should I submit an assignment change in Manager / Admin Self Service when someone is moving internally to a new team / department?

A: Same as above, if a member of staff has been hired internally through TRAC, there is no need to use Manager / Admin Self Service to change the assignment. This will be handled internally by recruitment. This avoids duplication of information / assignment changes.

Q: I've submitted a change of Base / Location, when will this update in the expenses system?

A: Once the change has been completed and approved in Manager / Admin Self Service, the system may take a day or two to update in the expenses system. For any queries, contact the expenses team.

ESR Manager/Admin Self Service – End Employment Questions

Q: Should I submit an End Employment in Manager / Admin Self Service when someone is moving internally to a new team / department?

A: No, if a member of staff is not leaving, they are being hired internally through TRAC, there is no need to use Manager / Admin Self Service to end the employment as they are not leaving. This will be handled internally by recruitment. This avoids duplication of information / effort.

Q: When I go to end a staff members employment, a warning message appears saying the member of staff has multiple assignments. What do I need to do?

A: Some members of staff may work elsewhere in the trust or have a Kernowflex post. In some cases the member of staff may still wish to work in these posts. If it is the Primary Assignment for this employee you are looking to end, you will need to contact the ESR Support Team for assistance.

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If the Assignment you need to end is not the primary post, you can go over to the “End Non-Primary Assignment (Approval Required)” option.

A guide can be found on the training portal: [Managers Self Service - Introduction \(cornwall.nhs.uk\)](#)

Q: I’m unable to complete an End Employment because there is an open absence in ESR?

A: If there is an open absence in ESR, it will need to be end dated before you can complete the End Employment.

Absence is recorded in the roster, so you will need to check it has been end dated there first, if it has been entered but the date isn’t in ESR then the interface has not sent it to ESR yet. This process is monthly and normally a month behind.

Please contact ESR Support for assistance. rcht.esrsupportteam@nhs.net

ESR Manager/Admin Self Service – Approving Manager Questions

Q: What is the difference between ‘Reject’ and ‘Return for Correction?’

A: When a transaction is rejected, it has been refused, and will not be able to be changed. This ends the transaction process. If you have received a transaction that you would like clarification or a change on, use ‘Return for Correction.’ This will send the transaction back to the person who submitted it, along with any comments you have made.

Q: I have accidentally rejected a Manager / Admin Self Service transaction. What do I need to do?

A: Unfortunately, once a transaction has been rejected, there is no way to retrieve it. Contact the submitting member of staff and ask them to re-submit the request again.

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=414>