Appendix 2: Manager Self Service Step by Step

Notifications

Key Points: Notifications will time out up to the next Supervisor level in ESR if they are not actioned within 8 days. It is important to action these as required when prompted by email (if set up in preferences).

Enter Sickness Absence for an Employee

Key Points: only Managers can enter sickness absence for employees; the absence **must** be entered in **chronological order** and **retrospectively** (except long term sickness).

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click **Absence**
4. Find employee and Click **Action** button
5. Ensure ***Absence Summary*** tab is selected (by default)
   Note: The boxes shown at the top of the screen are for Search results only
6. Click **Create Absence** button
7. Enter ***Absence Status*** : **Confirmed** (for retrospective entries)
8. *Enter ***Absence Type*** : **Sickness**
9. *Enter ***Level 1 Reason*** : **as per Sickness Absence policy** (To Use Search, click the magnifying glass; enter e.g. ***%flu%*** and click Go to search for options; click Quick Select button)
10. Enter *Level 2 Reason* : (not compulsory)
11. *Enter ***Start Date***, ***End Date*** of Sickness
12. *Enter ***Total*** (You can use **Calculate Duration** or type in total – ½ days are accepted)
13. *Enter ***Work Related*** : **Yes/No**
14. Enter *Third Party* : RTA/Other (if relevant)
15. *Enter **Return to Work Discussion Date** **(this is **ESSENTIAL**; we are reporting on this)**
16. Enter Occ Health referral date
17. HR Intervention = Yes or No
18. HR Intervention date
19. HR Manager – find appropriate manager
20. Enter Final interview date
21. Click Next
22. Add attachment if reqd
23. Click Submit

Note: if recording Start Date only for Long Term Sickness, you MUST remember to enter a Finish Date (the last day of sickness)!

It is essential that the return date is recorded as soon as the employee reports for work as delays could lead to overpayments. Please call Janet Melia at WFH 01743 277500 if unsure of process e.g. for long term absences.

For long term sickness, find employee and click **Update** to insert sickness finish date when they return to work (Start Date should have been completed when formally informed of long term sickness).

Recording Staff Appraisal through Manager Self Service

Key Points: Managers are currently only recording appraisal dates and core competencies. The manager currently initiates and completes each appraisal without the employee having access to it. We are not using the Share with Appraisee as yet. *Appraisal Reporting is a Trust requirement. ESR is used to ensure that all appraisals have been carried out.*

1. Log on
2. Click **Manager Self Service (Payroll Approvals Required)**
3. Click **Appraisals** (in the Manage Staff Careers section)
4. Select **Appraisals Tab** (default to Performance Management)
5. **Create *Standard Appraisal***, Click **Go** *(Small dropdown on top right hand side of screen)*
6. Find employee and click **Action** button
7. Step 1 of 3 … Create Standard Appraisal: Setup Details
    a. Complete ***Review Type***
    b. ***Period Start Date*** (date format: dd-MON-yyyy e.g. 01-JAN-2013)
    c. ***Period End Date***
    d. ***Template*** : **KSF Review** (search using magnifying glass, Click Go and Quick Select **KSF Review**)
    e. Enter ***Appraisal Date***
    f. Enter ***Next Review Date*** (future date will generate a reminder when due)
    g. **Main Reviewer** (already populated)
    h. Click **Next** button
8. Step 2 of 3 … Create Standard Appraisal: Overview
    a. Click **Default Position Competencies** button(to bring 6 core competencies through); if not available you will need to click **Add Competencies**; and
        i. select **KSF** (dropdown menu)
        ii. search for **%core%;**
        iii. **Select All** and
        iv. click **Apply** button
    b. Enter **Proficiency Rating** for Band (taken from Appraisals Policy on website)
    c. Click **Next** button
9. Step 3 of 3 … Check ratings and click **Save and Proceed** button
    a. Click **Complete Appraisal** button (please do not share with Appraisee)
    b. Enter **New Proficiency Level** against each ***Core Competency*** for Band (taken from Appraisals Policy on website)
    c. Click **Continue** button
    d. Click **Submit** button
10. *You cannot update a Completed Appraisal. Do you want to do this?* Click **Yes**

Enter a Change in Hours

Key Point: you will only be able to enter a change to hours if it is a reduction. The date cannot be retrospective and the usual process must be followed.

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click on **Hours** (approval required)
4. Find Employee and Click **Action** button
5. Click **Start**
6. Select **radio button** for ***changes option*** and ***change date*** (if reqd)
7. Click **Continue**
8. Update changes

9. Click **Next**
10. Check details
11. *Add attachments* if relevant/necessary
12. Click **Submit**
13. Click **Home**

End Employment (Approval Required)

Key Point: Please seek advice if the Employee leaving is a Manager/Administrator of staff as HR will have to reassign their hierarchy of staff to another Supervisor in ESR.

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click **End Employment** (Approval Required)
4. Find Employee and Click **Action** button
5. Click **Start**
6. Select **radio button** option and **enter date**
7. Enter **Reason**
8. Add information/comments (if required)
9. Click **Next**
   Important: If you are ending employment for a Manager/Administrator please seek advice from HR; do not continue (please contact Janet Melia for assistance); if ending employment for an Employee with no staff assigned in ESR, you can continue
10. ***Review changes*** and **add comments/attachments**
11. Click **Submit**

View / Update Personal Information for an Employee

Key Point: Employees are able to update their own details when they have access to Employee Self Service, Managers will receive notifications for some changes (if relevant or requiring approval).

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click Personal Information
4. Find Employee and Click Action button by correct employee
5. In the section you wish to change select either Add or Update
6. Make changes
7. Click Next
8. Check changes identified by a blue circle
9. Add supporting docs if reqd
10. Click Submit
11. Click Return to Overview to see an overview or click Home to go back to the main menu options

View Employment Information for an Employee

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click Employment Information
4. Click on **Staff Member** (*one click only*)
5. Select tab from: ***Employment, Performance, Training*** or ***Absence***
   Note: You will not be able to see information on Pay, Salary, Employee Relations
6. Optional: click **export employment** (or other) button to export data to a document (This is PID; please consult the Data Protection Act and Information Security policy)
7. Click **Home**

Enter Staff Property Information

Key Point: only your manager or a Manager working on behalf of your manager is able to enter Staff Property Information

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click **Property Register**
4. Find employee and click **Action** button
5. Click **Add**
6. Search using magnifying glass by Item name; Enter item name in search box; Click Go; Click radio button; Click Select button
7. Enter **Asset number**
8. Enter **Start Date**
9. Click **Apply**
10. Click **Next**
11. Add attachments if reqd
12. Click **Submit**
13. Click **Home**

Entering Qualifications

You can enter qualifications for yourself and staff you are responsible for. This will generate a notification to your manager for every qualification you enter. You need to discuss this with your manager to decide how to use this function.

Checking/Amending Registrations & Memberships

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click **Registrations & Memberships**
4. Find employee and click **Action** button
5. Update or amend field and click **Apply** button
6. Click **Next**
7. Review information and click **Submit** button

Enter Annual Leave for an Employee (Phase 2)

Key Points: this functionality is not fully operational at the moment but -

- you can use it to record leave if you just want to view it in the absence calendar
- you can only see leave on the calendar when it has been approved
- you can see absence for two levels below you in the hierarchy

1. Log on
2. Click Manager Self Service (Payroll Approvals Required)
3. Click **Employee Information**
4. Click **Absence**
5. Click **Action** button by correct employee
6. Ensure **Absence Summary** tab is selected
7. Click **Create Absence**
8. Select Absence **status**
9. Select type of **AfC annual leave accrual 1/2/3/4/5** (depending on assignment)
10. Enter start and end **dates**
11. Type in **number of days**
12. Click **Next**
13. Click **Submit**

Please <u>Do Not</u> Make Changes to:

You **<u>MUST NOT</u>** attempt to make changes to any of the following functions:

- Location
- Supervisor
- Manage Hires
- Maternity Leave

Important: If this information needs to be changed, you must pass the information to Janet Melia to update or correct as it has an impact on the ESR infrastructure of the organisation.

Who to contact for help?

Usernames & Passwords (if you have never been issued a Smartcard)

- If you have never had a Smartcard, please email **<u>esrselfservice@shropcom.nhs.uk</u>** giving your full name and employee number to be sent your username and password for ESR.

Workforce Data Validation & General Queries

- Janet Melia at William Farr House 01743 277500

Payslip & Payroll queries

- Rona.Cookson-Wynn@sath.nhs.uk Tel: 01743 492332
- Sickness must be entered chronologically; if put in out of sequence, it must be rectified by Payroll dept.

Learning / Training and e-Learning queries

- Quick Reference Guides available on Shropshire Community Health NHS Trust website under Staff Zone and Organisational Development. ESR e-Learning Support and ESR Self Service pages have information and relevant links.
- If unsure what course to book, please **refer to the Mandatory Training matrix** (on OD section of staff zone) in the first instance. Secondly check with your line manager. If you're still unsure please email <u>training@shropcom.nhs.uk</u>.
- There are regular e-Learning Practice Sessions (which include an optional ESR Employee Self Service 15 minute overview); please book through **Employee Self Service – Learning;** or **e-Learning**. You need to search for course: **825 e-Learning Workshops (H&S)**

IT Service Desk - 0800 1814050

- For missing desktop icons or software needing to be downloaded;
- For forgotten Smartcard login details or if your card cannot be unlocked locally contact the RA Team via the IT Service Desk.
- Use PC Check and check that your ESR will update from your computer by going into ESR e-Learning User; enrol and play 000 Using e-Learning in ESR/OLM – if showing two green ticks, it will update, if not then call the IT Service Desk to check your computer.

Further References & Information

Staff Zone / Organisational Development Pages on Shropshire Community Trust Website for updated policies and Mandatory Training Matrix

Sickness Absence Policy & Reason for Absence Codes
Staff Zone / Policies available on the website (keyword "sickness" or "absence"); *See Appendix C*