Supervisor Self Service

Managing Resident Doctors, Foundation Dentists & Public Health Registrars in ESR

A Guide to using your MyESR

2 -22

Welcome to ESR

DISCOVER YOUR ESR

Contents

1. Logging into my ESR using a Smartcard

1. Log into the **MyESR** website: **https://my.esr.nhs.uk/.**
You will be presented with the ESR Hub landing page.

To login, click on the **Login to ESR** button.

2. Log in with your **smartcard.**

3. Once you are logged in, if you are not already choose the **Go to MyESR Portal** using the link on the right hand side.

2. Logging into my ESR using Username & Password

1. Log into the **MyESR** website: **https://my.esr.nhs.uk/**. *You will be presented with the ESR Hub landing page.*
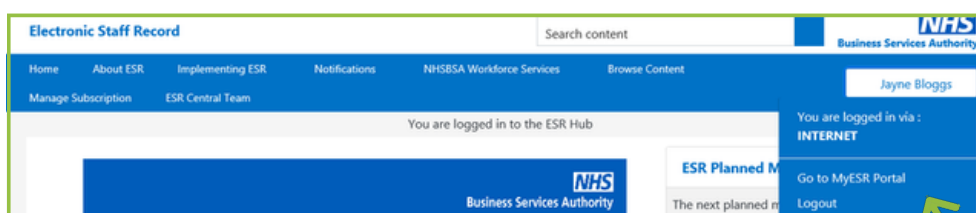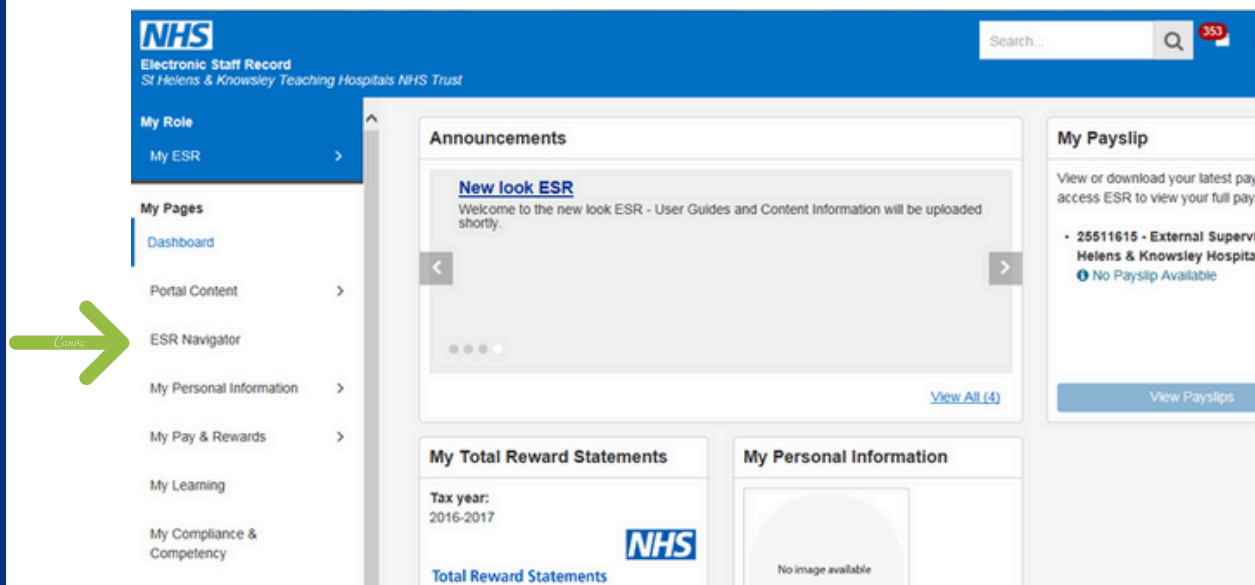

To login, click on the **Login to ESR** button.

2. Log in with your using your **Username** & **Password**

3. Once you are logged in, if you are not already choose the **Go to MyESR Portal** using the link on the right hand side.
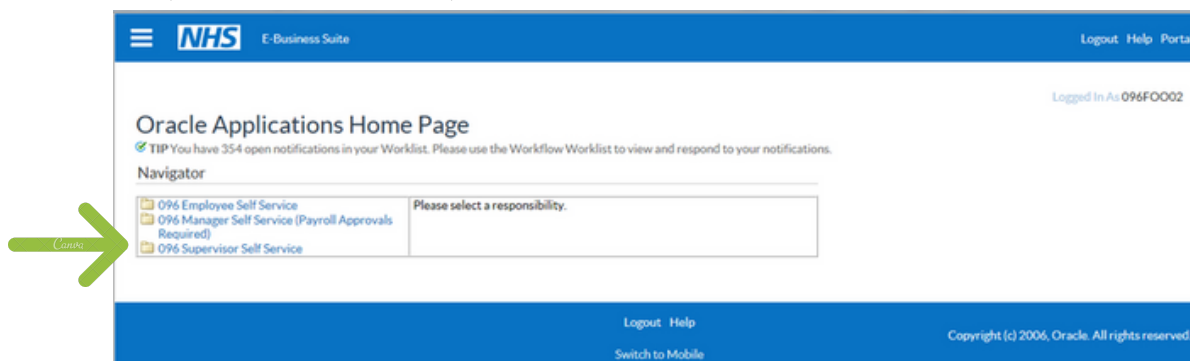
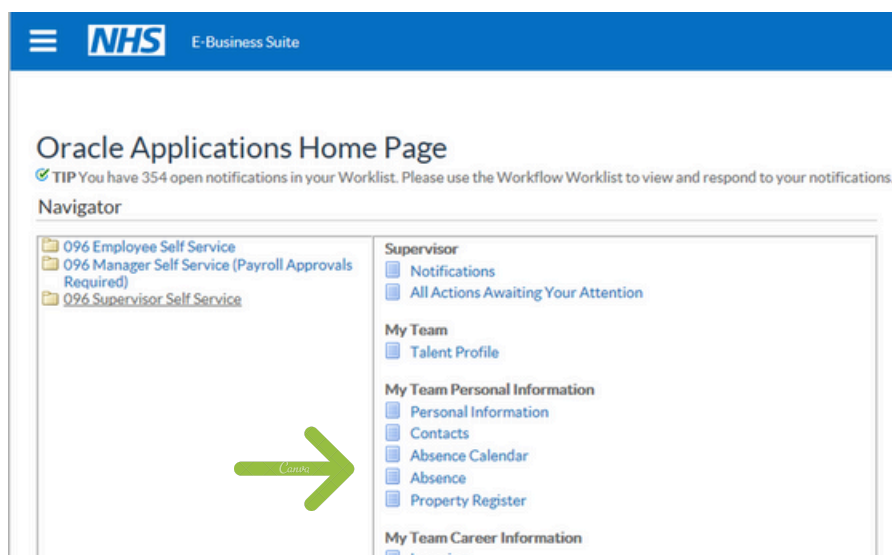# 3. Accessing Supervisor Self Service to input Absence

1. Select **ESR Navigator**

2. Select **096 Supervisor Self Service** or **096 Supervisor Self Service (Limited Access)**
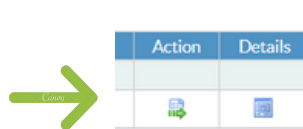

3. Select **Absence**

4. Click on the **action** button next to the employee you wish to enter the leave against.

NOTE: If there is more than one person with access to the employees then you
may need to expand the selection by using the "+" icon next to their name.

5. The next page will show you the absence summary for that employee; from here you can view the employee's previous absences. To enter any kind of absences click on the "create absence" button.

3.1 Recording a Non Covid Sickness Absence

1. Select Absence Type **Sickness**

2. Click on the Torch next to the **Level 1 Reason** field. Do not type anything in the text box.

3. A new pop up box will appear. Again do not type anything in the text box. Click the **"Go"** button. And select a reason from the Level 1 List

4. Once you have selected a reason select **Select**

5. Optional – You can also select a valid level 2 Reason using the same process used to select the level 1 Reason. This is not a mandatory field but is helpful for reporting if you can choose one. There is usually a level 2 reason for "Other" or "Not Specified" if there is no exact match.

6. Enter the **Start Date**

NOTE: Only enter an end date for the sickness if the employee has already returned and is back in work. It is important that you do not enter a future end date. Leave the sickness as open ended until the employee has returned. If the sickness is now closed, enter the end date and click the calculate duration button. All calendar days need to be included in the calculation including weekends and bank holidays. For part time staff the number of days will be the same as for full time staff.

7. Select **Submit**

3.2 Recording a Covid Sickness Absence

1. Select Absence Type **Sickness**

2. Click on the Torch next to the **Level 1 Reason** field. Do not type anything in the text box.

3. A new pop up box will appear. Again do not type anything in the text box. Click the **"Go"** button. Select S15 Chest & Respiratory Problems and Select

4. Do not enter a **Level 2 Related Reason**

5. Scroll down to **Related Reason.** Click on the Torch next to the **Related Reason.** Do not type anything in the text box**.**

6. A new pop up box will appear. Again do not type anything in the text box. Click the **"Go"** button.

7. Select the Appropriate Reason from the below list

8. After selecting the below reason, click **Select**

Search By Related Reason [v] [   ] [Go]

Results

	Quick Select	Related Reason
○		Coronavirus (COVID-19)

Search and Select: Related Reason   Cancel Select ←

Search

9. Scroll up to Start Date: Enter the **Start Date** for the Covid Sickness

NOTE: Only enter an end date for the sickness if the employee has already returned and is back in work. It is important that you do not enter a future end date. Leave the sickness as open ended until the employee has returned. If the sickness is now closed, enter the end date and click the calculate duration button. All calendar days need to be included in the calculation including weekends and bank holidays. For part time staff the number of days will be the same as for full time staff.

10. Select **Submit**

3.3 How to Record Study Leave

1. Select Absence Type **Study Increasing Bal**

2. The absence reason will default as **Study leave**

3. Enter the **Start Date** of the Study Leave

4. Enter the **End Date** of the Study Leave

5. Enter the number of days' leave booked. Use decimals to record anything less than a full day (for example 0.5 days).

6. Select **Submit**

3.4 How to Record Special Leave

1. Select Absence Type **Special Increasing Bal**

NOTE: If the Special Leave is unpaid please select Unpaid Authorised Special or Unpaid Unauthorised Special. Please also ensure if this is to be unpaid that you advise the Lead Employer Payroll Team: LeadEmployerPayroll@merseywestlancs.nhs.uk

2. Using the arrow next to **Absence Reason s**elect the appropriate absence e.g. Carer's Leave, Bereavement, Compassionate Leave

3. Enter the **Start Date** of the Special Leave

4. Enter the **End Date** of the Special Leave

5. Enter the number of days' leave booked. Use decimals to record anything less than a full day (for example 0.5 days).

NOTE: Special Leave is usually only taken 1 day at a time at the Manager's discretion. Only record special leave if this has been approved and the employee has not already exceeded their entitlement. Refer to the special leave policy if you are unsure.

6. Select **Submit**

3.5 How to update an Open Sickness Episode to add an end date, return to work discussion date and Occupational Health referral date.

1. Select **ESR Navigator**
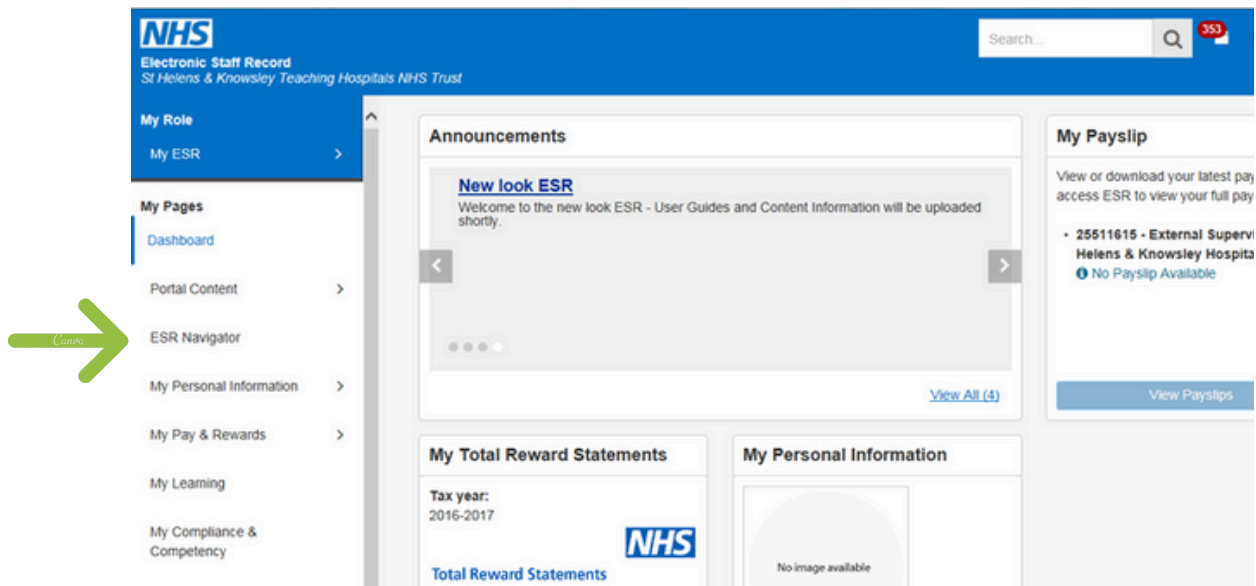
2. Select **096 Supervisor Self Service** or **096 Supervisor Self Service (Limited Access)**
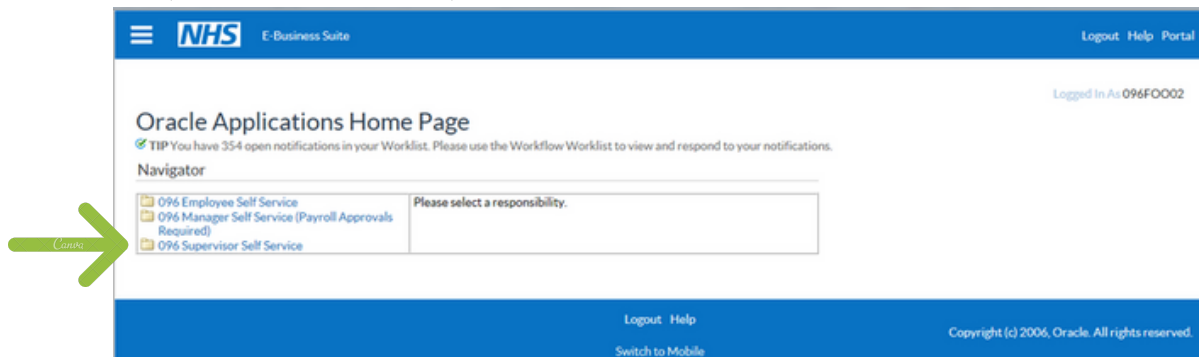
3. Select **Absence**
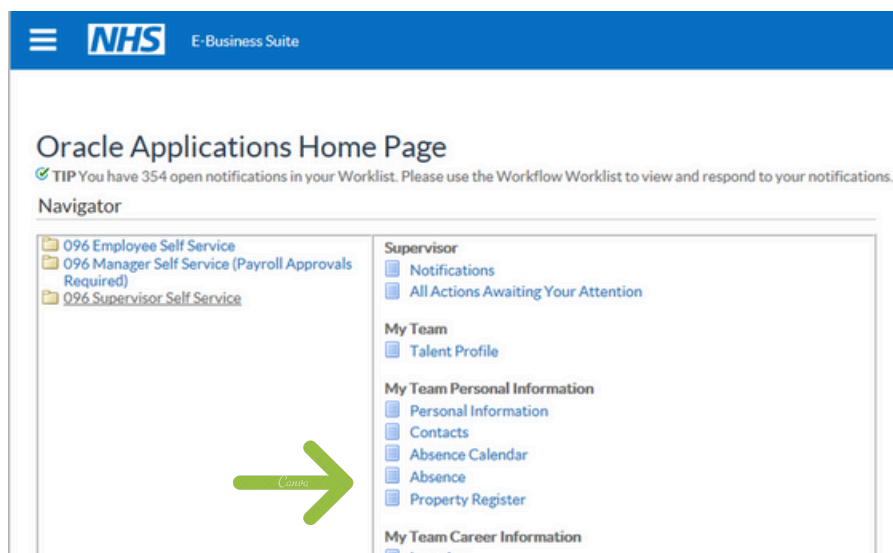
4. Click on the **details** button next to the employee you wish to enter the leave against.

NOTE: If there is more than one person with access to the employees then you may need to expand the selection by using the "+" icon next to their name.

Action	Details
🔀	🔲
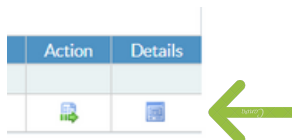
5. The Employee's Absence Summary will now show. Select the **"Update"** pencil on the sickness entry

Absence Management

Absence Summary	Entitlement Balances

Search

Note that the search is case insensitive

Absence Type	[▼]	Start Date	(24-Oct-2020, 📅)
Approval Status	[▼]	End Date	📅

Go   Clear

Create Absence | Export Absences | Individual Calendar | Hierarchy Calendar | 🔀 ♻ 🔳 ⚙ ▼ 🔲

Start Date ▼	End Date △	Absence Type △	Absence Category △	Duration Days	Hours	Approval Status △	Details	Update	Delete
08-Nov-2020		Sickness	Sickness			Approved	🔲	✏	🗑

6. Enter the **Absence End Date.** Click the **Calculate Duration Button**

| Absence Type	Sickness
Level 1 Reason	S15 Chest & respiratory problems 🔍
Level 2 Reason	🔍

Duration * Start Date 08-Nov-2020 📅 End Date 21-Nov-2020 📅

☑TIP Start Date is required.

Days	
	Calculate Duration
Total 14	☑TIP Duration is calculated based on the number of full calendar days between the start and end date of your absence. **You may need to update this duration** to take account of your work pattern (e.g. to exclude weekends).

7. Enter the **Return to Work Discussion Date.** If the employee has been referred to Occupational Health then this date should also be entered

Return to Work Discussion Date	22-Nov-2020	📅
Occupational Health Referral Date		📅

8. Select **Submit**

9. The row on the Absence Summary page should now show as a complete row with both a start date and end date.

3.6 How to add annual Leave

1. Select **ESR Navigator**
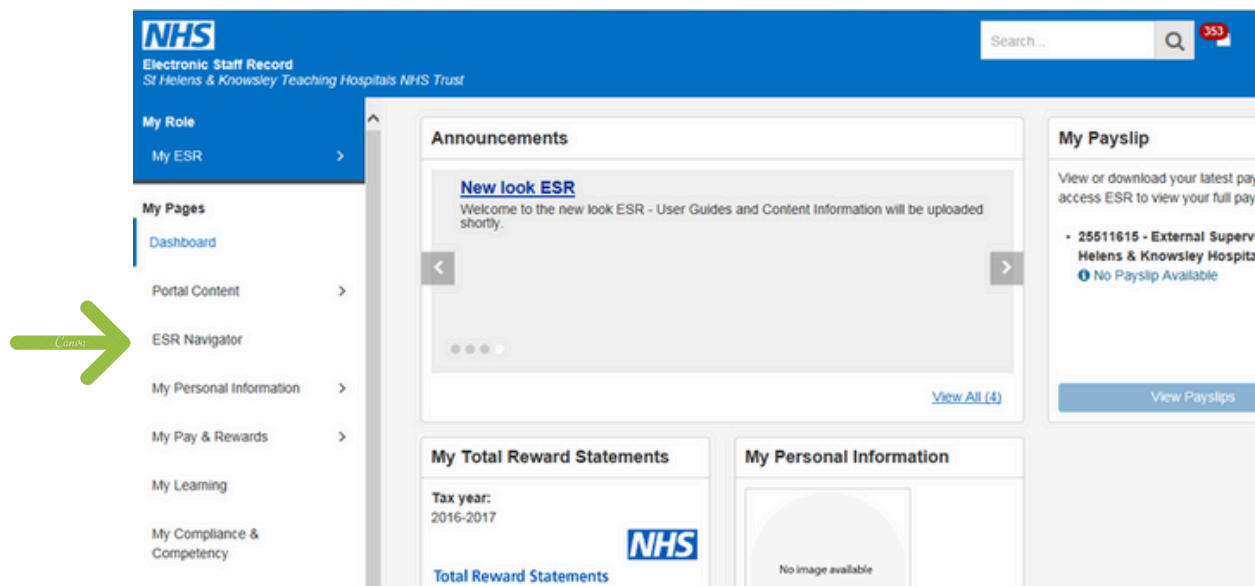
2. Select **096 Supervisor Self Service** or **096 Supervisor Self Service (Limited Access)**
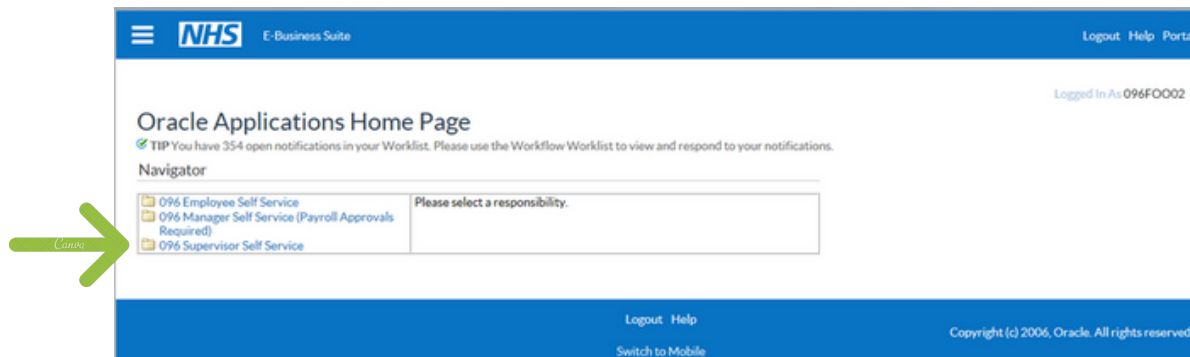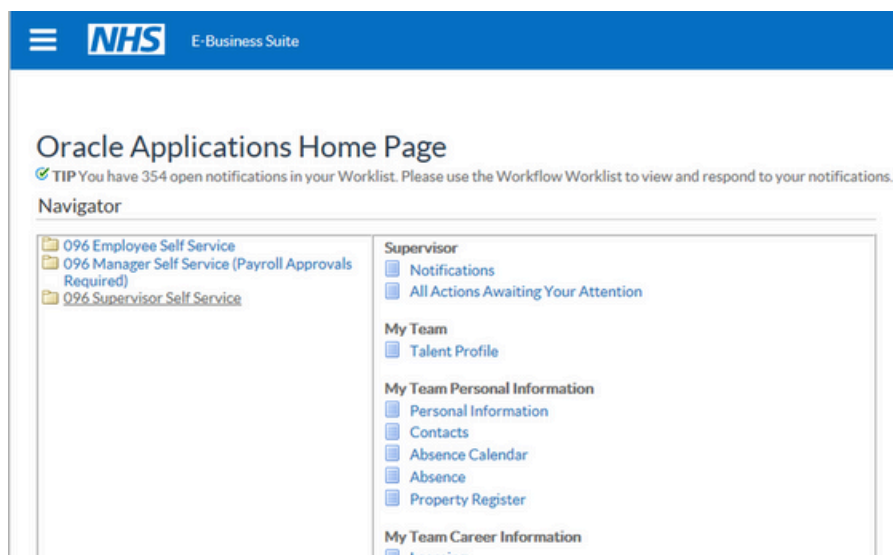
3. Select **Absence**

4. Select the Relevant Annual leave accrual Plan from the list of available **absence type.** This is usually Annual Leave Hours 1 for most staff.

The Absence Reason will default as Annual leave.

5. Enter the **Start Date** and **End Date** of annual leave

6. Enter number of hours leave booked. Use Decimals to record where appropriate e.g. 1.5 days

7. Click on the next button in the top right, if you have entered any duration different to that the system has calculated it will flag up as a warning. You can override this by clicking next again.

8. The system will then show you a summary page on what you are about to enter onto the system. If everything looks correct click Submit. If anything looks wrong click the Back button and re-enter the details.

NHS My Team Personal Information

Home Logout Help Portal

Create Absence: Review

Cancel Printable Page Back Submit

Employee Name **Keshri, Dr Arjun**
Employee Number **26072013**

Absence Details

	Proposed
Absence Status	Confirmed
Absence Type	Annual Leave Accrual 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	18-Oct-2017
End Date	18-Oct-2017
Days	0.5

View Entitlement Balances

View Entitlement Balance

Cancel Printable Page Back Submit

Home Logout Help

Switch to Mobile

<u>4. How to view Annual Leave Balance</u>

1. Select **ESR Navigator**
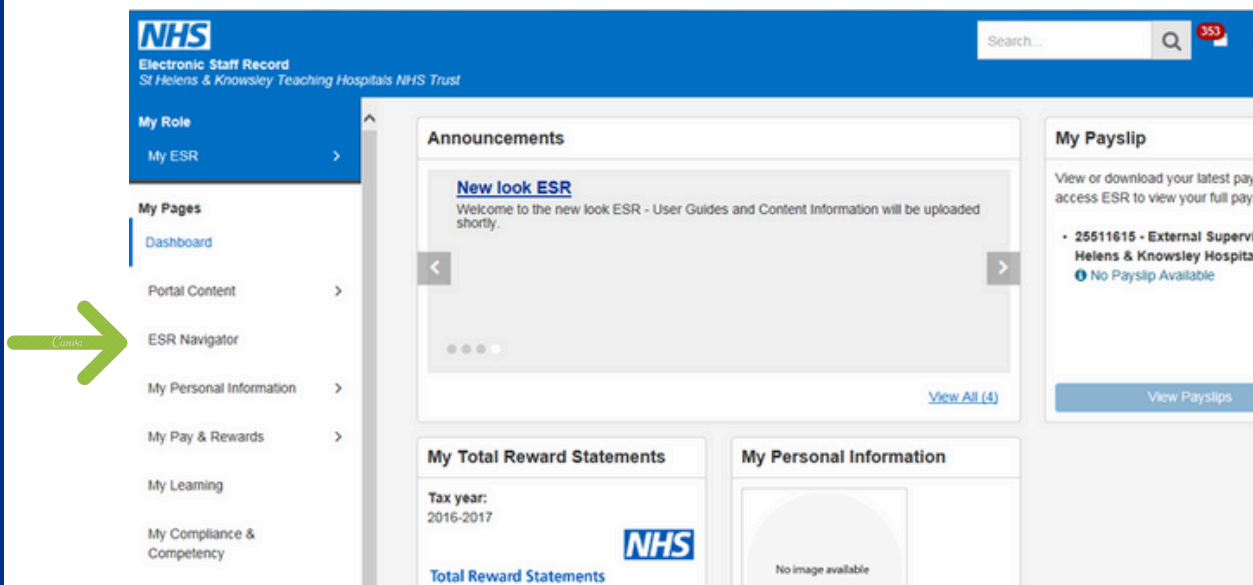
2. Select **096 Supervisor Self Service** or **096 Supervisor Self Service (Limited Access)**
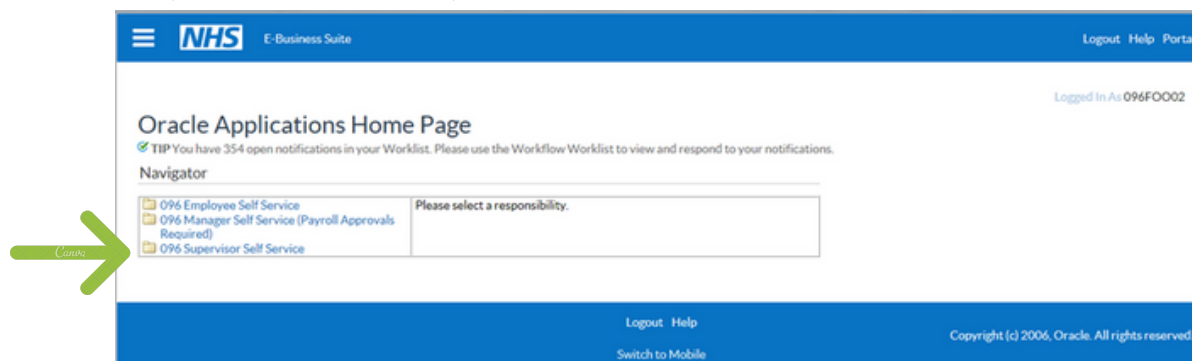
3. Select **Absence**
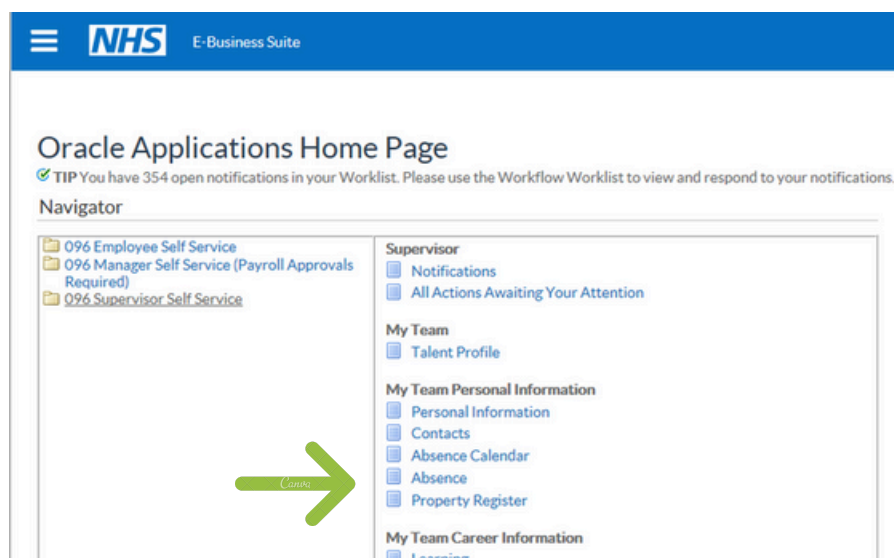
4. Click on the **action** button next to the employee you wish to enter the leave against.

NOTE: If there is more than one person with access to the employees then you may need to expand the selection by using the "+" icon next to their name.

5. The next page will show you the absence summary for that employee. Select Entitlement Balances.

6. This will then show the Gross Yearly Accrual and New Accrual for the employee

5. Manager FAQs

Q. I cannot see a member of staff under my supervision on ESR.
A. Contact ESR Helpdesk providing staff full name and department and they will update ESR.

Q. How do I get access to the ESR Portal?
A. Contact ESR Helpdesk and they will send relevant forms out via email to be completed.

Q. I want another member of staff to supervise employees that are under my supervision but I still need to see them.
A. Yes this is possible. Contact the ESR Helpdesk with details of the second supervisor.

Q. I have tried to enter sickness but I get the OSP Error Message as shown here

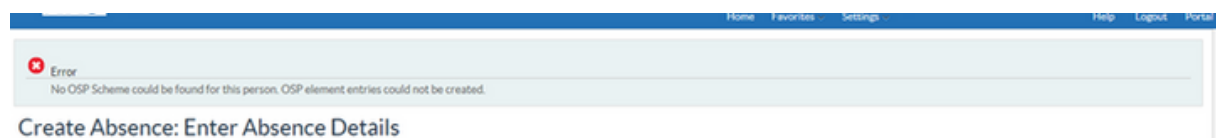*A. This is a payroll element that is missing. Please contact the ESR Helpdesk and they will be able to advise Payroll to input this into the employees record*

Q. I am trying to enter sick leave but I get date overlapping error message.
A. Check recorded leave that there are no open ended dates. If there are close any previous leave from the date that the employee returned to work. There could also be annual leave entered for the same day as sickness (which if not a Bank Holiday would need to be taken out of ESR).

Q: I have entered sickness but the staff member actually took as Annual leave or Special Leave.
A. If agreed by the Line Manager that this needs amending; provide dates to the Lead Employer Absence Support team who will amend this on the system

Q. Can I input all sickness weekly?

A. Absence data is updated each day in ESR, so where possible sickness needs to be entered on the day that the employee is first absent. The same applies to closing open ended sickness episodes, which need to be closed within 7 days of the return to work date. Managers get a notification in ESR if an episode is still open after 7 days.

Q. I need to add a sickness into a record but the staff member is no longer under my supervision as they have gone to another department or Location.

A. Send the details over to the Lead Employer Absence Support Team who will record centrally. Once a member of the team no longer works there, the previous Manager/Supervisor loses access to their record on ESR. New absences can be added by the taking on Manager but not retrospective dates prior to them joining the new team.

Contact Details

ESR Helpdesk:
ESR.Helpdesk@merseywestlancs.nhs.uk

Absence Support :
absencesupport.leademployer@merseywestlancs.nhs.uk

Lead Employer Helpdesk:
Lead.Employer@merseywestlancs.nhs.uk