

Supervisor Self Service

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

A Guide to using your MyESR

2 -22



Welcome to ESR



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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**.

Log in with your credentials

Fields with an asterisk (*) are required fields

Username*

(Example: 999JSMITH01)

Password*

[Forgotten](#) | [Request Username/Password](#) | [Unlock Account](#)

Log in via Username Password

Log in with your Care Identity

Access ESR via your Care Identity by clicking the 'Log in with my Care Identity' button below

NHS Log in with my Care Identity



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.

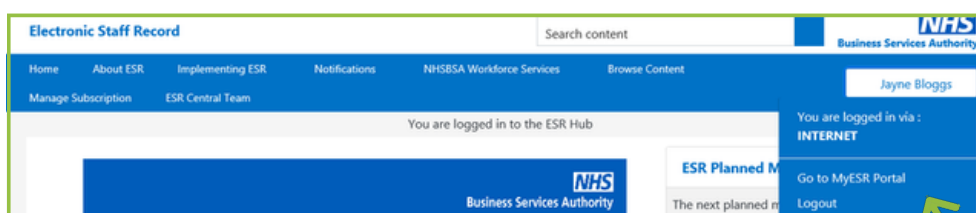


To login, click on the **Login to ESR** button.



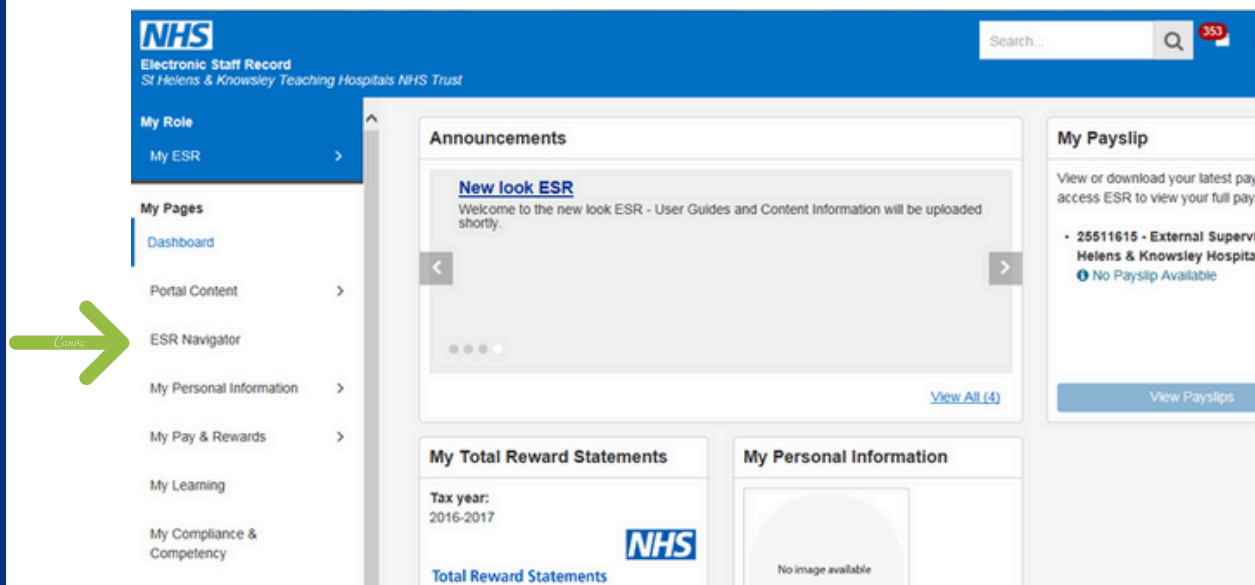
2. Log in with your using your **Username & Password**

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.

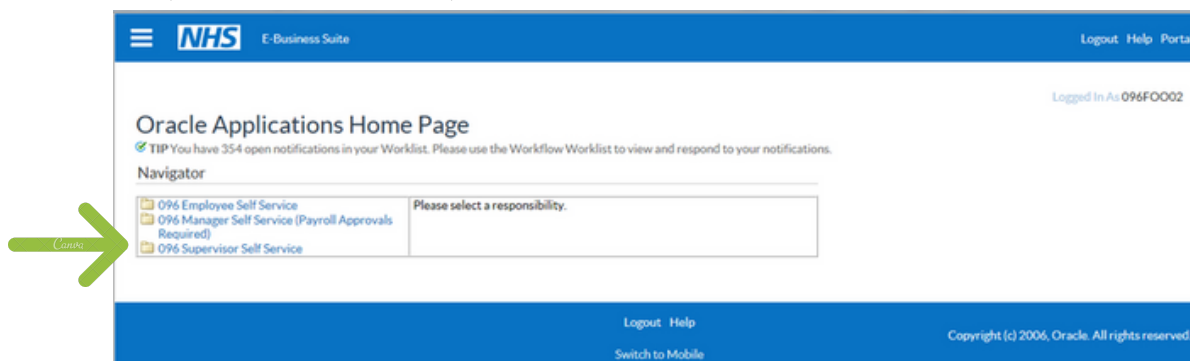


3. Accessing Supervisor Self Service to input Absence

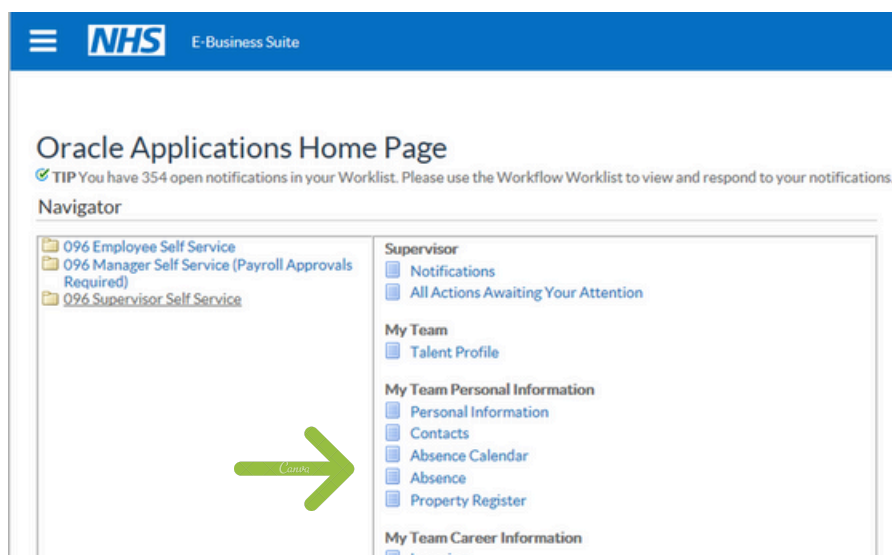
1. Select **ESR Navigator**



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

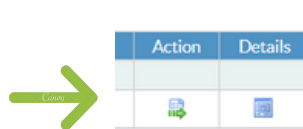


3. Select **Absence**



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

Select	Quick Select	Level 1 Reason
<input type="radio"/>		S10 Anxiety/stress/depression/other psychiatric illnesses
<input type="radio"/>		S11 Back Problems
<input type="radio"/>		S12 Other musculoskeletal problems
<input type="radio"/>		S13 Cold, Cough, Flu - Influenza
<input type="radio"/>		S14 Asthma
<input type="radio"/>		S15 Chest & respiratory problems
<input type="radio"/>		S16 Headache / migraine
<input type="radio"/>		S17 Benign and malignant tumours, cancers
<input type="radio"/>		S18 Blood disorders
<input type="radio"/>		S19 Heart, cardiac & circulatory problems

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**

The screenshot shows the 'Absence Type' selection interface. A green arrow points to the 'Absence Type' dropdown menu. Below it, the 'Absence Reason' dropdown is visible. The 'Duration' section shows 'Start Date' and 'End Date' both set to 19-Oct-2022. There are fields for 'Start Time' and 'End Time' with a time range of 00:00 to 23:59. A 'Calculate Duration' button is present. Below this, there are fields for 'Days' and 'Hours' lost, and a 'Total' field. A list of reasons is shown on the left, including 'Hours Lost', 'Sessions Lost', 'Working Days Lost', 'AIC First Period Hours Override', 'AIC Last Period Hours Override', 'Work Related', 'Third Party', 'Disability Related', 'Violence and Aggression Related', 'Notifiable Disease', 'Return to Work Discussion Date', 'Occupational Health Referral Date', 'HR Intervention', and 'HR Intervention Date'. A calendar for October 2022 is visible on the right.

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


The screenshot shows the 'Level 1 Reason' selection interface. A green arrow points to the 'Level 1 Reason' field, which has a search icon (torch) next to it. The 'Absence Type' is set to 'Sickness'. Below it, the 'Level 2 Reason' field is visible. The 'Duration' section shows 'Start Date' and 'End Date' both set to 19-Oct-2022. There are fields for 'Start Time' and 'End Time' with a time range of 00:00 to 23:59. A 'Calculate Duration' button is present. Below this, there are fields for 'Days' and 'Hours' lost, and a 'Total' field. A list of reasons is shown on the left, including 'Hours Lost', 'Sessions Lost', 'Working Days Lost', 'AIC First Period Hours Override', 'AIC Last Period Hours Override', 'Work Related', 'Third Party', 'Disability Related', 'Violence and Aggression Related', 'Notifiable Disease', 'Return to Work Discussion Date', 'Occupational Health Referral Date', 'HR Intervention', and 'HR Intervention Date'. A calendar for October 2022 is visible on the right.



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


Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the “Go” button.

Search By Level 1 Reason Go 

Results

Select	Quick Select	Level 1 Reason
	No search conducted.	

Search and Select: Level 1 Reason Cancel Select 











Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the “Go” button.

Search By Level 1 Reason Go

Results


Rows 1 to 25

Select	Quick Select	Level 1 Reason
<input type="radio"/>		S10 Anxiety/stress/depression/other psychiatric illnesses
<input type="radio"/>		S11 Back Problems
<input type="radio"/>		S12 Other musculoskeletal problems
<input type="radio"/>		S13 Cold, Cough, Flu - Influenza
<input type="radio"/>		S14 Asthma
<input type="radio"/>		S15 Chest & respiratory problems
<input type="radio"/>		S16 Headache / migraine
<input type="radio"/>		S17 Benign and malignant tumours, cancers
<input type="radio"/>		S18 Blood disorders
<input type="radio"/>		S19 Heart, cardiac & circulatory problems


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.

HK Intervention Date

HR Manager 

Final Interview Date

Surgery Related 

Related Reason  

Assessment Date

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 Go

Results

	Quick Select	Related Reason
<input type="radio"/>		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**

* Absence Type ▼

Absence Reason ▼

Duration * Start Date 19-Oct-2022 End Date 19-Oct-2022

Start Time HH:MM (00:00-23:59) End Time HH:MM (00:00-23:59)

☒ TIP Start Date is required.

Days Hours

Total Calculate Duration

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).

Hours Lost

Sessions Lost

Working Days Lost

AIC First Period Hours Override

AIC Last Period Hours Override

Work Related Q

Third Party Q

Disability Related Q

Violence and Aggression Related Q

Notifiable Disease Q

Return to Work Discussion Date Q

Occupational Health Referral Date Q

HR Intervention Q

HR Intervention Date Q

October 2022

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

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

* Absence Type Study Increasing Bal ▼

Absence Reason Study Leave ▼

Duration * Start Date 05-Nov-2020 End Date 05-Nov-2020

☒ TIP Start Date is required.

Days

Total 1 Calculate Duration

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).

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

The screenshot shows the 'Absence Reason' dropdown menu open, displaying various options such as 'Hours Lost', 'Sessions Lost', 'Working Days Lost', 'AIC First Period Hours Overdue', 'AIC Last Period Hours Overdue', 'Work Related', 'Third Party', 'Disability Related', 'Violence and Aggression Related', 'Notifiable Disease', 'Return to Work Discussion Date', 'Occupational Health Referral Date', 'HR Intervention', and 'HR Intervention Date'. A green arrow points to the dropdown arrow next to the 'Absence Reason' field.

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

The screenshot shows the 'Absence Type' dropdown menu set to 'Special Increasing Bal' and the 'Absence Reason' dropdown menu open. A green arrow points to the dropdown arrow next to the 'Absence Reason' field. The 'Duration' section shows 'Start Date' as 19-Oct-2022 and 'End Date' as 19-Oct-2022. The 'Calculate Duration' button is visible, and a tip states: '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).'.

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).

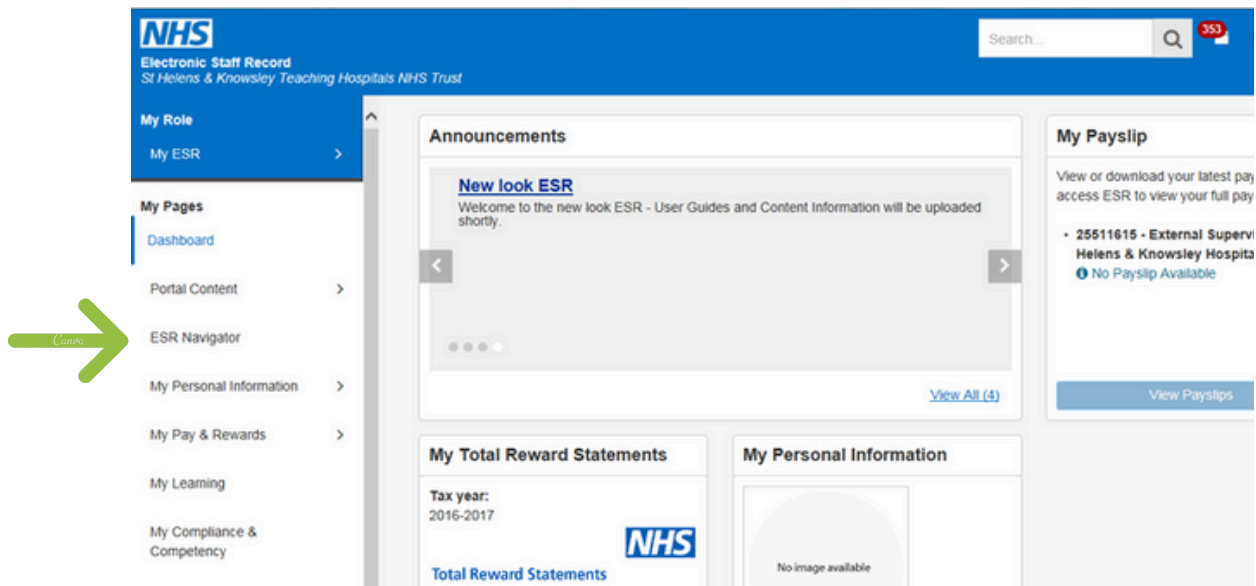
NOTE: Special Leave is usually only taken 1 day at a time at the Manager's discretion. Only record special leave if this has been approved and the employee has not already exceeded their entitlement. Refer to the special leave policy if you are unsure.

6. Select **Submit**

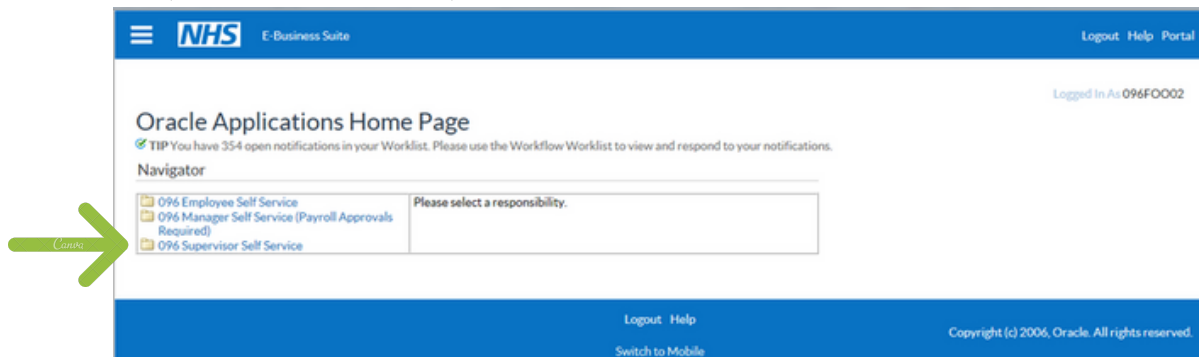


3.5 How to update an Open Sickness Episode to add an end date, return to work discussion date and Occupational Health referral date.

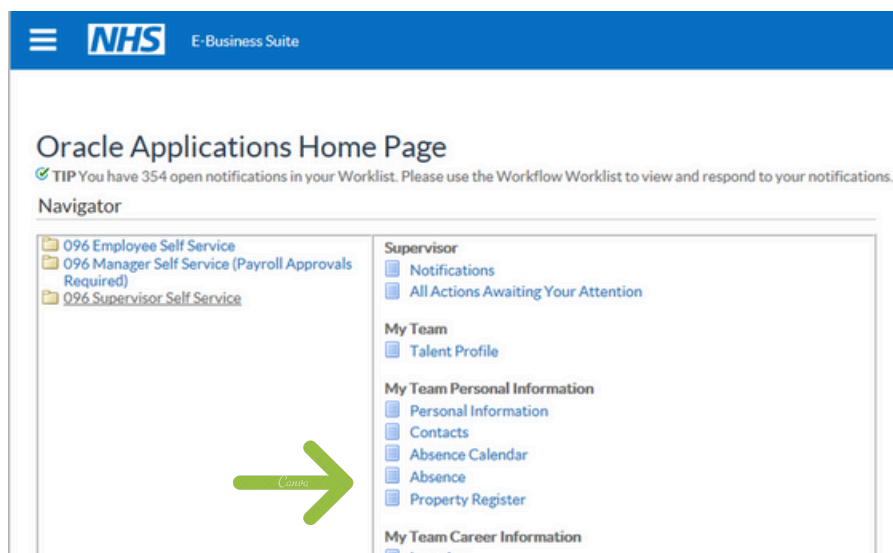
1. Select **ESR Navigator**



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

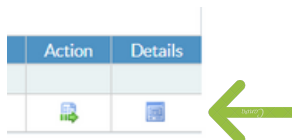


3. Select **Absence**



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.



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		Approval Status	Details	Update	Delete
				Days	Hours				
08-Nov-2020		Sickness	Sickness			Approved			

A green arrow points to the pencil icon in the 'Update' column of the first row.

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

Total 14

Calculate Duration

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).

A green arrow points to the 'End Date' field.

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.


Confirmation
 Your changes have been applied.

Absence: Summary

Employee Name **Sandwell29, Paula**
 Employee Number **20016035**

Absence Management

[Absence Summary](#)
[Entitlement Balances](#)




Search

Note that the search is case insensitive

Absence Type
 Start Date
 Approval Status
 End Date

[Go](#)
[Clear](#)

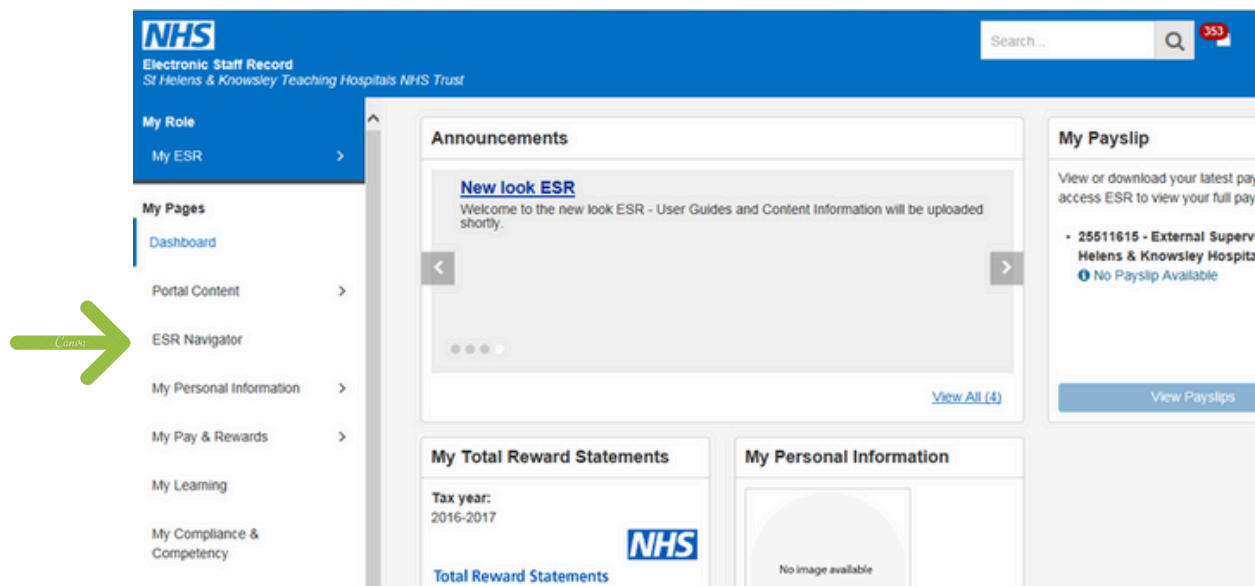
[Create Absence](#)
[Export Absences](#)
[Individual Calendar](#)
[Hierarchy Calendar](#)

Start Date ▼	End Date ▲	Absence Type ▲	Absence Category ▲	Duration		Approval Status ▲	Details	Update	Delete
				Days	Hours				
08-Nov-2020	21-Nov-2020	Sickness	Sickness	14		Approved			

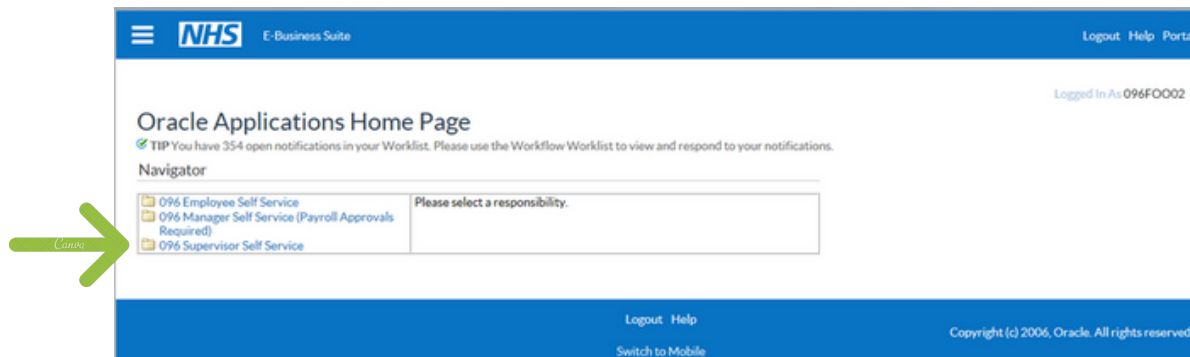


3.6 How to add annual Leave

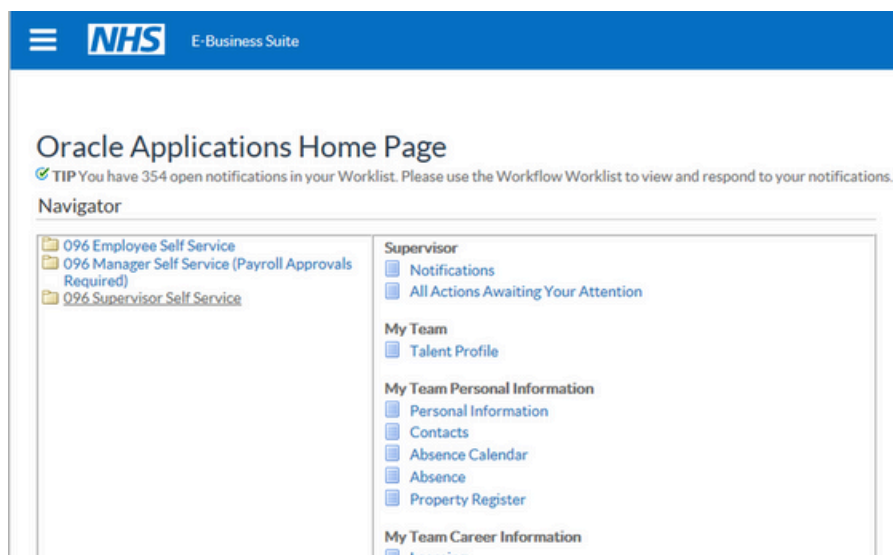
1. Select **ESR Navigator**



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.

Employee Name: Keshri, Dr Arjun
Employee Number: 26072013

Select an Absence Type, and enter any other information you want to record for your request. You can choose the Calculate Duration Button to see the number of days or hours you are requesting.

Indicates required field

Absence Type: Annual Leave Accrual 1
Absence Reason: Annual Leave

Start Date: 18-Oct-2017
End Date: 18-Oct-2017

TIP Start Date and End Date are required.

Days: 0.5
Total: 0.5

Calculate Duration

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).

Calendar: October 2017

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.

Warning: The absence duration in days is different from the actual time absent. Continue?

Employee Name: Keshri, Dr Arjun
Employee Number: 26072013

Select an Absence Type, and enter any other information you want to record for your request. You can choose the Calculate Duration Button to see the number of days or hours you are requesting.

Indicates required field

Absence Type: Annual Leave Accrual 1
Absence Reason: Annual Leave

Start Date: 18-Oct-2017
End Date: 18-Oct-2017

TIP Start Date and End Date are required.

Days: 0.5
Total: 0.5

Calculate Duration

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).

Calendar: October 2017

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

Employee Name Keshri, Dr Arjun
Employee Number 26072013

Cancel

Printable Page

Back

Submit

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

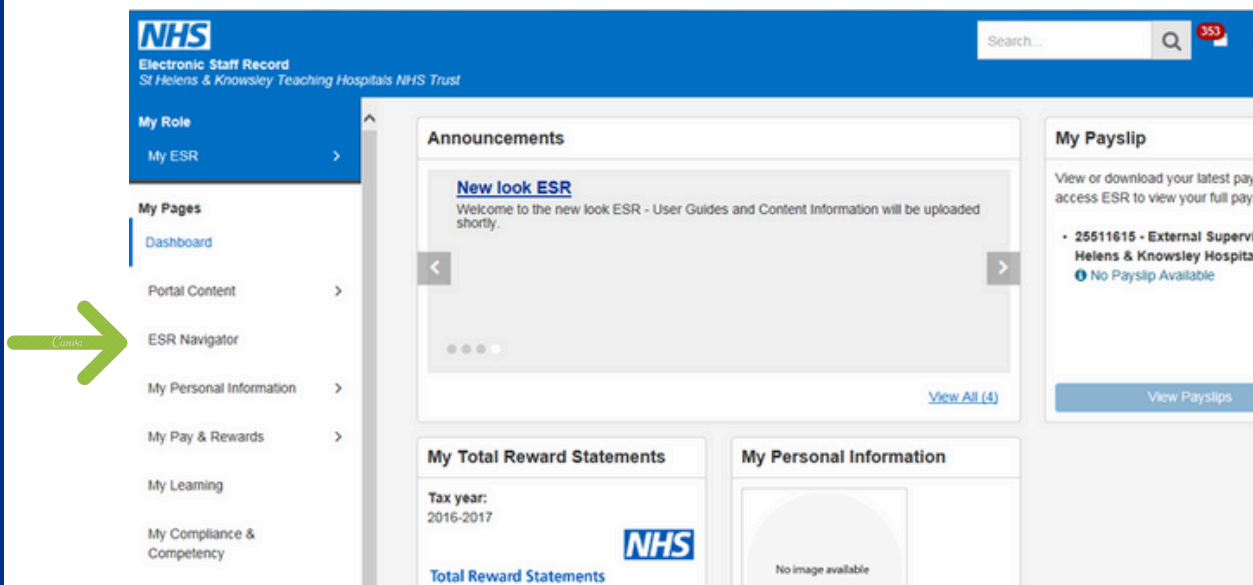
Switch to Mobile

Copyright (c) 2006, Oracle. All rights reserved.

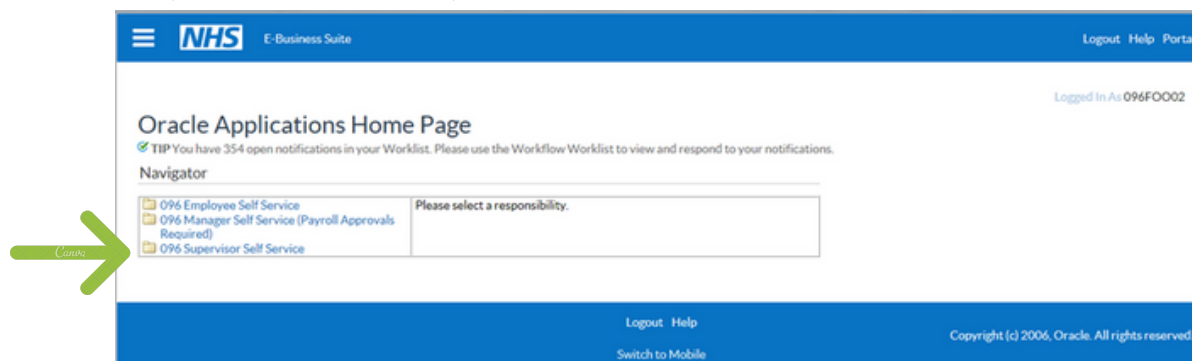


4. How to view Annual Leave Balance

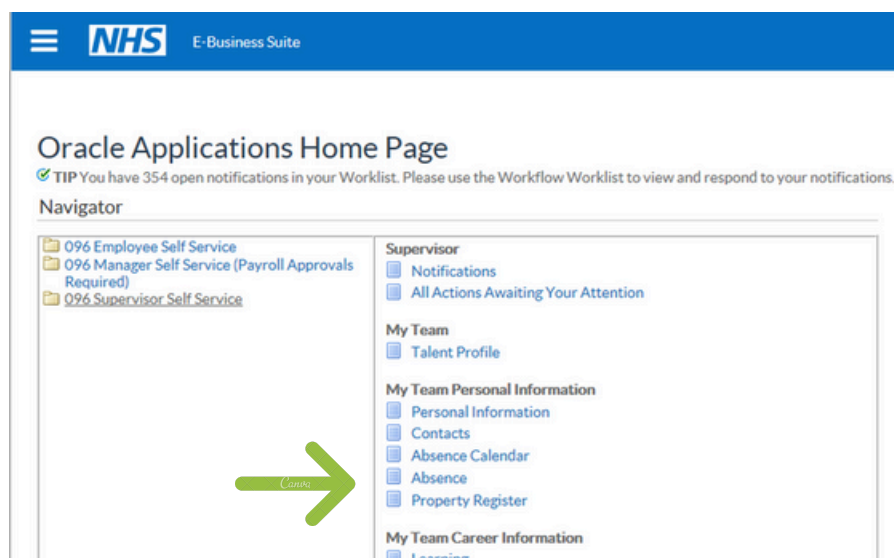
1. Select **ESR Navigator**



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

▼ Hide Accrual Balances

- TIP** Accrual plan balances do not include leave entered as 'Planned'. Depending on the accrual plan allocated, balances will either display the full year's entitlement to date with future dated 'Confirmed' leave not affecting the balance until the confirmed leave dates are passed. The Gross figure shown will include 'Bank Holidays'.
- TIP** The accrual balances are as of: 19-Oct-2022.
- TIP** Enter the date for which you wish to view Leave accruals.

Effective Date (19-Oct-2022) **Go**

Annual Leave Hours 1 NHS (30385326)	
Gross Accrual	322.5
Net Accrual	127.5
Include Bank Holidays	Yes (As they fall)



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.

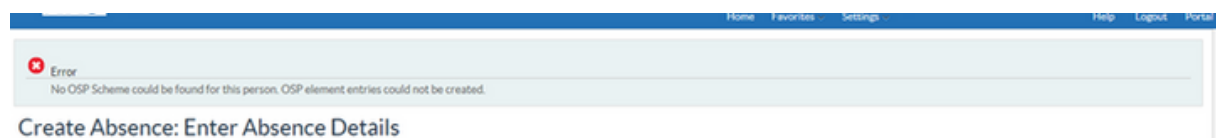
Q. How do I get access to the ESR Portal?

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

