

# Supervisor Self Service

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

## A Guide to using your **MyESR**

**2 -22**

DISCOVER  
YOUR  
ESR

**Welcome to ESR**



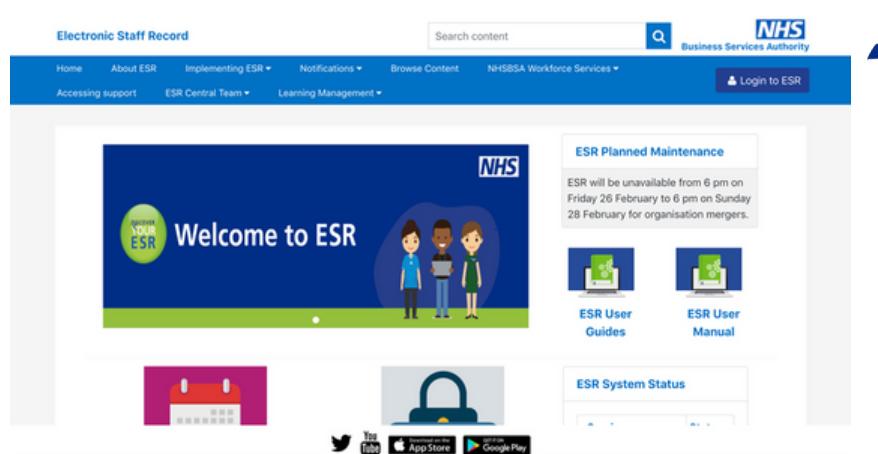
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## 1. Logging into my ESR using a Smartcard

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**

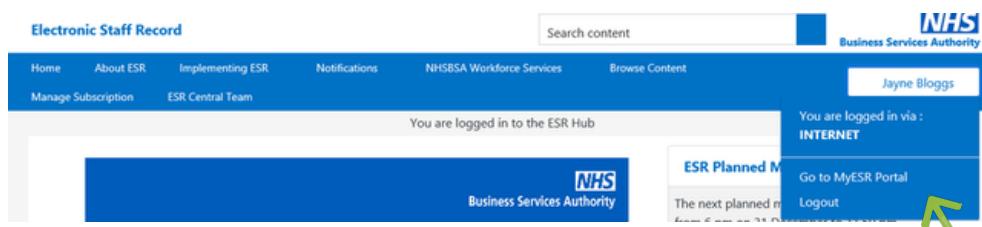
### Log in with your Care Identity

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

**NHS** Log in with my Care Identity

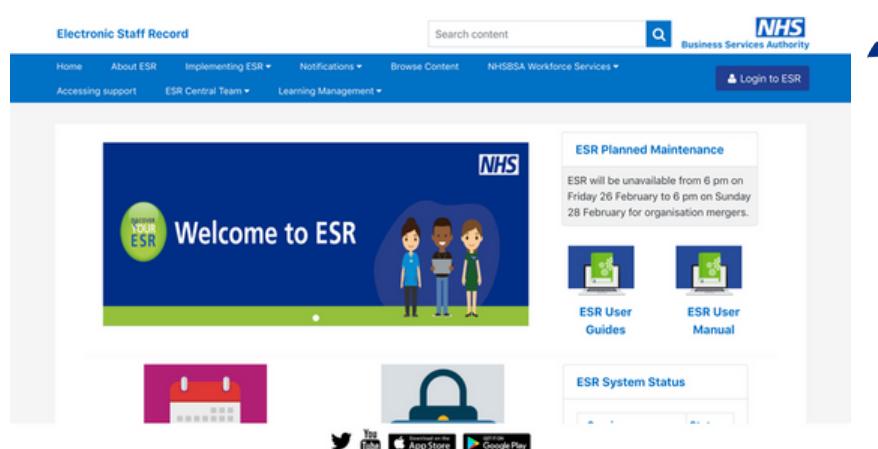


3. Once you are logged in, if you are not already choose the **Go to MyESR Portal** using the link on the right hand side.



## 2. Logging into my ESR using Username & Password

- 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.



- Log in with your using your **Username & Password**

Log in with your credentials

Fields with an asterisk (\*) are required fields

Username\*

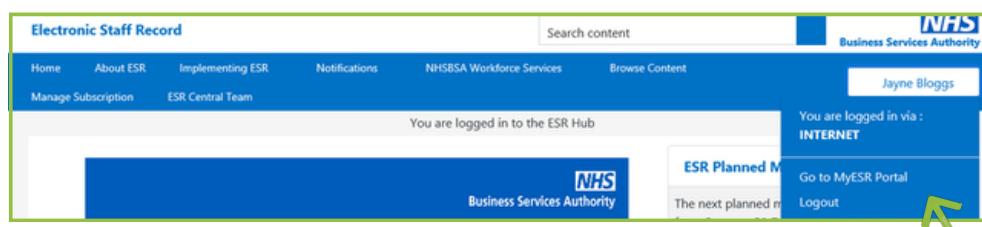
(Example: 999JSMITH01)

Password\*

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

**Log in via Username Password**

- 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**

The screenshot shows the NHS ESR homepage. The left sidebar has a 'My Pages' section with 'Dashboard' selected. A green arrow points to the 'ESR Navigator' link. The main content area includes an 'Announcements' box with a 'New look ESR' message, a 'My Total Reward Statements' box for the 2016-2017 tax year, and a 'My Personal Information' box showing a placeholder image.

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

The screenshot shows the Oracle Applications Home Page. The left sidebar has a 'Navigator' section with '096 Supervisor Self Service' selected. A green arrow points to this link. The main content area includes a 'TIP' message about notifications, a 'Logout' link, a 'Switch to Mobile' link, and a 'Copyright (c) 2006, Oracle. All rights reserved.' message.

#### 3. Select **Absence**

The screenshot shows the Oracle Applications Home Page. The left sidebar has a 'Navigator' section with '096 Supervisor Self Service' selected. A green arrow points to this link. The main content area includes a 'TIP' message about notifications, sections for 'Supervisor', 'My Team', 'My Team Personal Information', and 'My Team Career Information'.

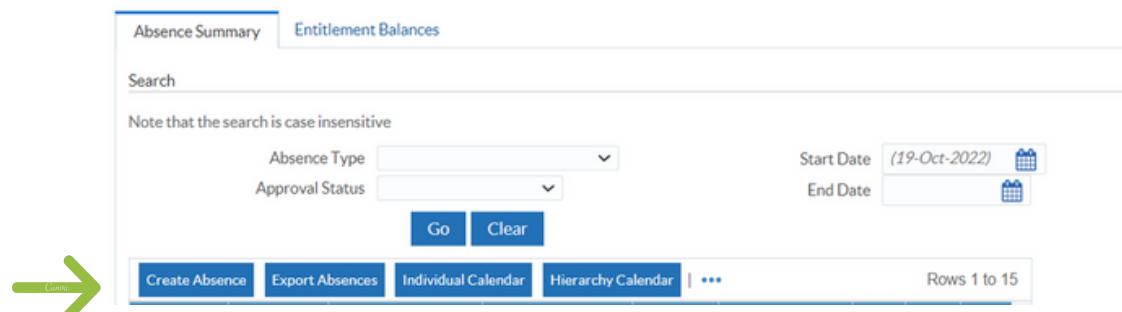


4. Click on the **action** button next to the employee you wish to enter the leave against.

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.

\* Absence Type: Sickness

Level 1 Reason:

Level 2 Reason:

Duration: \* Start Date: (19-Oct-2022) End Date: (19-Oct-2022)

TIP Start Date is required.

Days

**Calculate Duration**

Total:

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. 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

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

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**

**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.



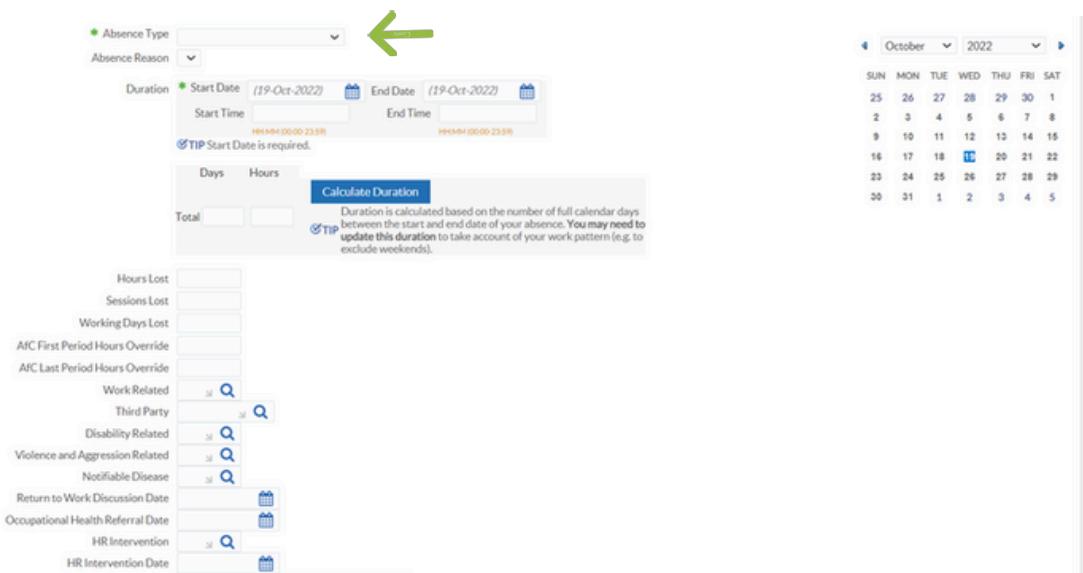
## 6. Enter the **Start Date**

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**

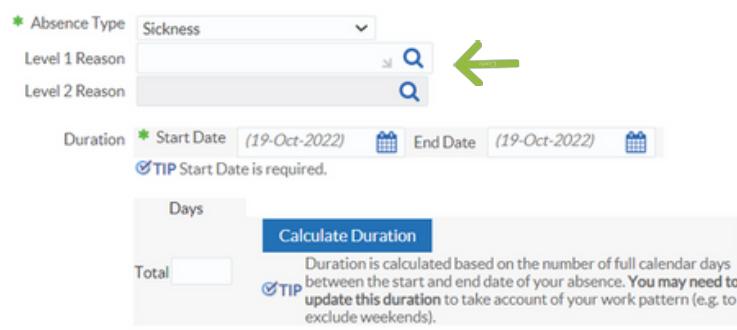
### 3.2 Recording a Covid Sickness Absence

#### 1. Select Absence Type **Sickness**



A screenshot of a web-based absence recording system. The 'Absence Type' dropdown is set to 'Sickness'. A green arrow points to the 'Absence Reason' dropdown menu, which is currently open. The 'Duration' section shows 'Start Date' and 'End Date' both set to '19-Oct-2022'. Below these are 'Start Time' and 'End Time', both showing 'HHMM(00:00-23:59)'. A tooltip for the 'Start Date' field states: 'TIP Start Date is required.' A 'Calculate Duration' button is visible. To the right is a calendar for October 2022, showing the days of the week and the dates from 25 to 31. The 19th is highlighted in blue. A note at the bottom of the form says: '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).'

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



A screenshot of the same absence recording interface. The 'Absence Type' is still 'Sickness'. The 'Level 1 Reason' dropdown is open, showing a list of reasons with a magnifying glass icon next to it. A green arrow points to this icon. The 'Level 2 Reason' dropdown is also visible below it. The 'Duration' section is identical to the previous screenshot. The same note about calculating duration is present at the bottom.



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    

Results

Select	Quick Select	Level 1 Reason
		No search conducted.

Search and Select: Level 1 Reason

Cancel  

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

Results

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.

HR 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**

Results

	Quick Select	Related Reason
<input type="radio"/>		Coronavirus (COVID-19)

Search and Select: Related Reason

Search

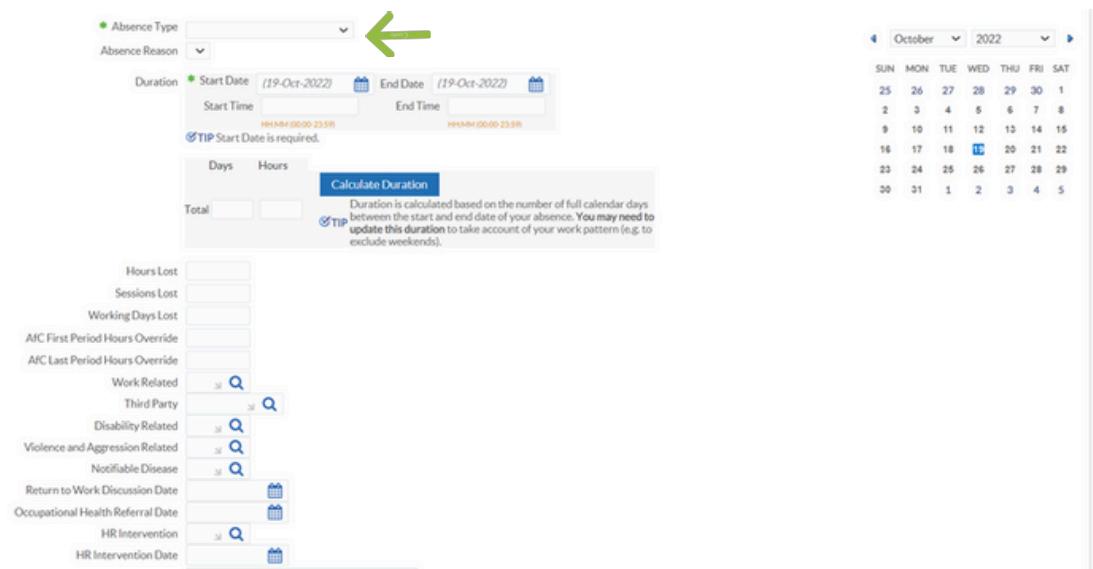
9. Scroll up to Start Date: Enter the **Start Date** for the Covid Sickness

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**

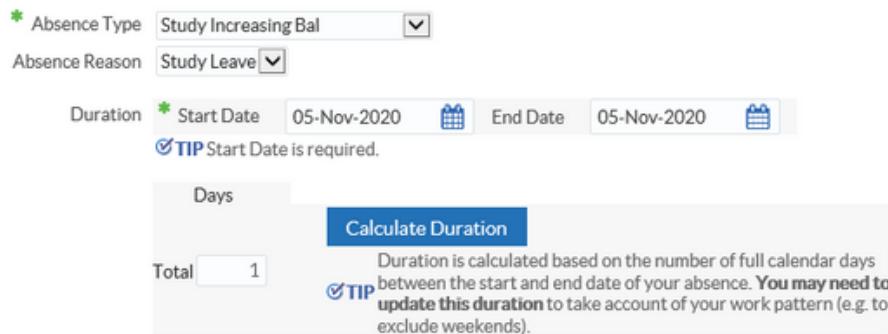
### 3.3 How to Record Study Leave

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



A screenshot of a software interface for recording absence. At the top, there is a dropdown menu labeled 'Absence Type' with 'Study Increasing Bal' selected. A green arrow points to this dropdown. Below it is another dropdown for 'Absence Reason' with 'Study Leave' selected. The 'Duration' section shows 'Start Date' as '19-Oct-2022' and 'End Date' as '19-Oct-2022'. There are 'Start Time' and 'End Time' fields, both showing 'HH:MM 00:00 23:59'. A note says 'TIP Start Date is required.' Below the duration fields is a 'Calculate Duration' button. To the right of the duration fields is a calendar for October 2022, showing the days of the week and the dates 25 through 31. Below the duration section is a list of absence categories with search icons: 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.

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



A screenshot of the same software interface. The 'Absence Type' dropdown is now set to 'Study Increasing Bal' and the 'Absence Reason' dropdown is set to 'Study Leave'. The 'Duration' section shows 'Start Date' as '05-Nov-2020' and 'End Date' as '05-Nov-2020'. A note says 'TIP Start Date is required.' Below the duration fields is a 'Calculate Duration' button. To the right of the duration fields is a calendar for November 2020, showing the days of the week and the dates 01 through 30. Below the duration section is a list of absence categories with search icons: Days, Total (set to 1), Calculate Duration, 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 note below the 'Calculate Duration' button 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). TIP'.

#### 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** select 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**

NHS  
Electronic Staff Record  
St Helens & Knowsley Teaching Hospitals NHS Trust

My Role  
My ESR

My Pages  
Dashboard

Portal Content

ESR Navigator

My Personal Information

My Pay & Rewards

My Learning

My Compliance & Competency

Announcements

New look ESR  
Welcome to the new look ESR - User Guides and Content Information will be uploaded shortly.

View All (4)

My Total Reward Statements  
Tax year: 2016-2017

NHS

Total Reward Statements

My Personal Information  
No image available

My Payslip  
View Payslips

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

NHS E-Business Suite

Logout Help Portal

Logged In As: 096FOO02

Oracle Applications Home Page

TIP You have 354 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notifications.

Navigator

096 Employee Self Service  
096 Manager Self Service (Payroll Approvals Required)  
096 Supervisor Self Service

Please select a responsibility.

Logout Help  
Switch to Mobile

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#### **3. Select Absence**

NHS E-Business Suite

Oracle Applications Home Page

TIP You have 354 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notifications.

Navigator

096 Employee Self Service  
096 Manager Self Service (Payroll Approvals Required)  
096 Supervisor Self Service

Supervisor  
Notifications  
All Actions Awaiting Your Attention

My Team  
Talent Profile

My Team Personal Information  
Personal Information  
Contacts  
Absence Calendar  
Absence  
Property Register

My Team Career Information  
Learning

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      Approval Status      Start Date (24-Oct-2020)      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
08-Nov-2020		Sickness	Sickness	Days      Hours	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

Total 14

Duration is calculated based on the number of full calendar days between the start and end date of your absence.  TIP 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.

The screenshot shows the 'Absence: Summary' page. At the top, a green 'Confirmation' box displays the message: 'Your changes have been applied.' Below this, the employee details are shown: Employee Name: Sandwell29, Paula and Employee Number: 20016035. The main content area is titled 'Absence Management' and contains a 'Search' section with fields for 'Absence Type' (dropdown), 'Approval Status' (dropdown), 'Start Date' (24-Oct-2020), and 'End Date' (dropdown). Below the search is a table with the following data:

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**

NHS  
Electronic Staff Record  
St Helens & Knowsley Teaching Hospitals NHS Trust

My Role  
My ESR

My Pages  
Dashboard

Portal Content

ESR Navigator

My Personal Information

My Pay & Rewards

My Learning

My Compliance & Competency

Announcements

New look ESR  
Welcome to the new look ESR - User Guides and Content Information will be uploaded shortly.

View All (4)

My Total Reward Statements

Tax year:  
2016-2017

NHS

Total Reward Statements

My Personal Information

No image available

My Payslip

View or download your latest pay access ESR to view your full pay

25511615 - External Supervisor  
Helens & Knowsley Hospital

No Payslip Available

View Payslips

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

NHS E-Business Suite

Logout Help Portal

Logged In As: 096FOO02

Oracle Applications Home Page

TIP You have 354 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notifications.

Navigator

096 Employee Self Service  
096 Manager Self Service (Payroll Approvals Required)  
096 Supervisor Self Service

Please select a responsibility.

Logout Help  
Switch to Mobile

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### 3. Select **Absence**

NHS E-Business Suite

Oracle Applications Home Page

TIP You have 354 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notifications.

Navigator

096 Employee Self Service  
096 Manager Self Service (Payroll Approvals Required)  
096 Supervisor Self Service

Supervisor

Notifications  
All Actions Awaiting Your Attention

My Team

Talent Profile

My Team Personal Information

Personal Information  
Contacts  
Absence Calendar  
Absence  
Property Register

My Team Career Information

Learning



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
Duration	* Start Date: 18-Oct-2017 (example: 18-Oct-2017) End Date: 18-Oct-2017 (example: 18-Oct-2017) <input checked="" type="checkbox"/> TIP Start Date and End Date are required. Days Calculate Duration Total: 0.5 Hours Lost

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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. 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.

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
Duration	* Start Date: 18-Oct-2017 (example: 18-Oct-2017) End Date: 18-Oct-2017 (example: 18-Oct-2017) <input checked="" type="checkbox"/> TIP Start Date and End Date are required. Days Calculate Duration Total: 0.5 Hours Lost

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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

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.



 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](#)

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## 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.

Absence Summary      Entitlement Balances

Search

Note that the search is case insensitive

Absence Type      Approval Status      Start Date (19-Oct-2022)      End Date

Go      Clear

Create Absence      Export Absences      Individual Calendar      Hierarchy Calendar      \*\*\*      Rows 1 to 15

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

Absence Summary      Entitlement Balances

▼ 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'.

**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.**

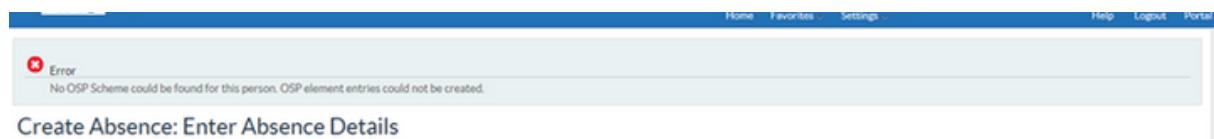
Q. How do I get access to the ESR Portal?

**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](mailto:ESR.Helpdesk@merseywestlancs.nhs.uk)

Absence Support :

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Lead Employer Helpdesk:

[Lead.Employer@merseywestlancs.nhs.uk](mailto:Lead.Employer@merseywestlancs.nhs.uk)

