

# Electronic Staff Record

## Supervisor Self Service (SSS)

### User Guide

**ESR Supervisor Self Service (SSS)** provides managers and supervisors with real-time information about their staff and empowers them to have greater access and control of their workforce data.

Supervisor Self Service (SSS) allows supervisors to:

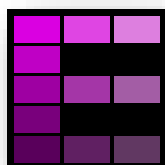
- View your Hierarchy.
- View and validate absence information.
- Record Return to Work Discussions
- Approving requests for Training
- Access training matrix for staff to view compliance.

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## Accessing ESR

Most staff will have access to the icon below on their desktop:



Please click Login to ESR.

Electronic Staff Record

**NHS**  
Business Services Authority

Search

Login to ESR

**DISCOVER YOUR ESR** **Welcome to ESR**

**Notification of ESR unavailability**

ESR will be unavailable from 6 pm on Friday 27 January 2023 until 6 pm on Sunday 29 January 2023 for essential maintenance.

On the following screen, users can select the way they login, either via Smartcard or Username and Password. Smartcards give more access for some roles and should be used if available.

**Log in with your credentials**

Fields with an asterisk (\*) are required fields

Username\*

(Example: 999JSMITH01)

Password\*

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

**Log in with your Smartcard**

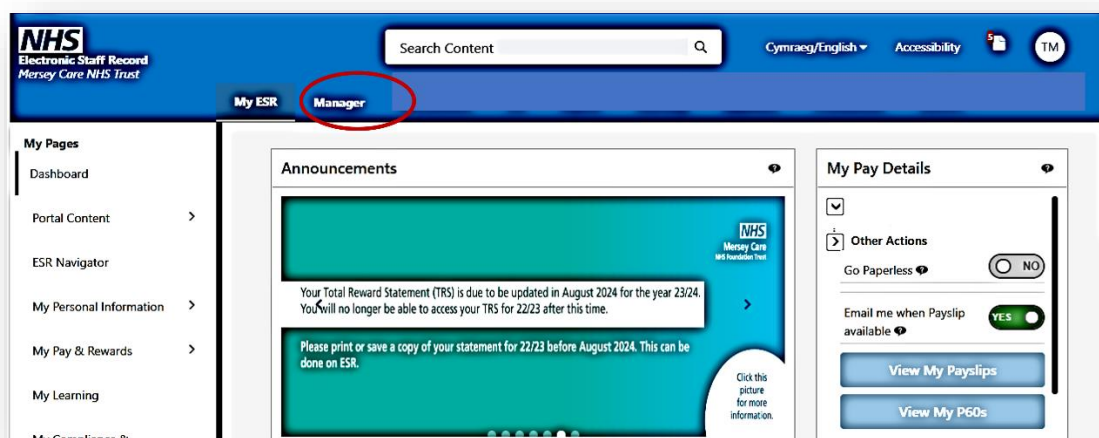
Access ESR by inserting your Smartcard and entering your PIN, and then selecting the 'Log in via Smartcard' button

## My ESR Dashboard

Once you have logged in you will be taken to the 'My ESR dashboard. This page has a number of key features such as links to notifications, a search facility, and portlets. These portlets provide easy access to your information and direct links to the relevant ESS pages.

To access Superior Self Service, click on the 'Manager' tab.

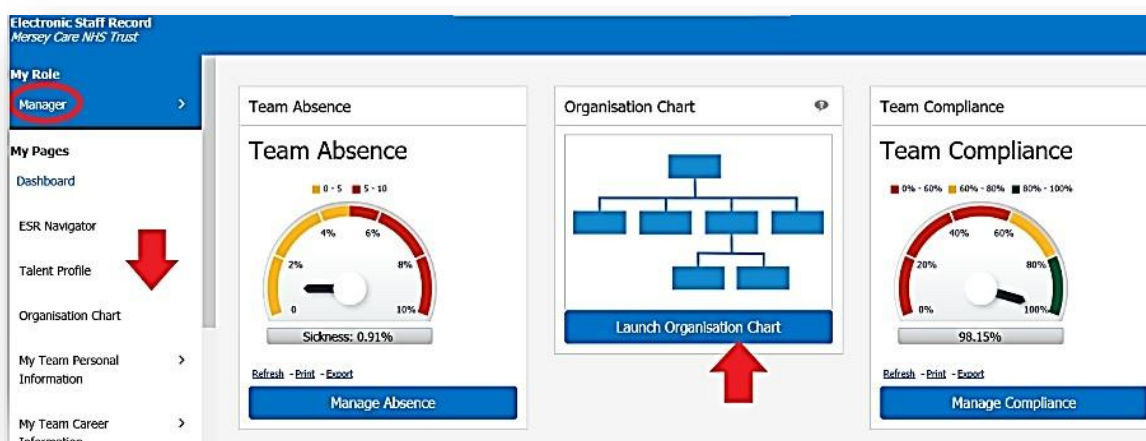
The '**Side Bar**' on the left-hand side includes quick links to key features such as 'My Personal Information.'



## View Your Org Chart (Hierarchy)

Before you start utilising the functions of SSS you should access your Org chart to ensure it is accurate. To do this you can use the **ESR Organisation Chart Functionality**

To access from the portal, click on MY ESR (left hand side of the screen and click on Manager) the screen below will show the manager portal. Click on **'Launch Organisation Chart'** on the side bar left hand side of the blue button on the dashboard (as below).



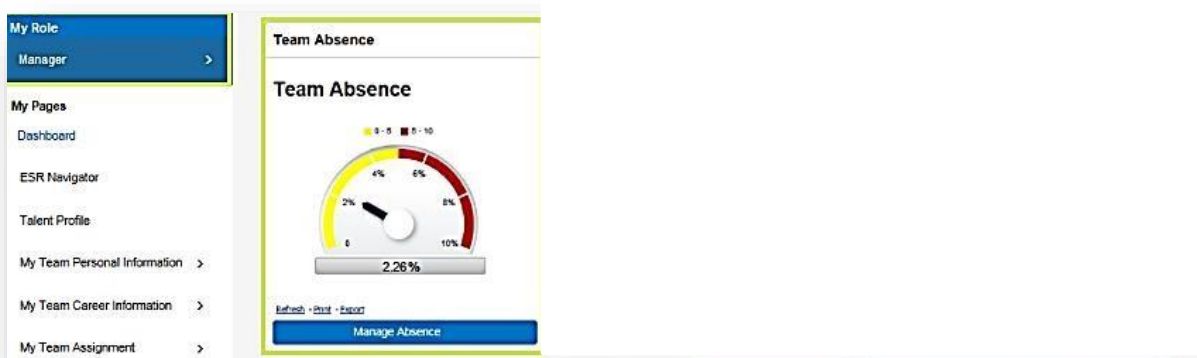
The Organisation chart will display. This could take a couple of minutes to load due to the size of the Organisation. If you feel this is not an accurate reflection of your org chart, please contact [esradmin@merseycare.nhs.uk](mailto:esradmin@merseycare.nhs.uk)



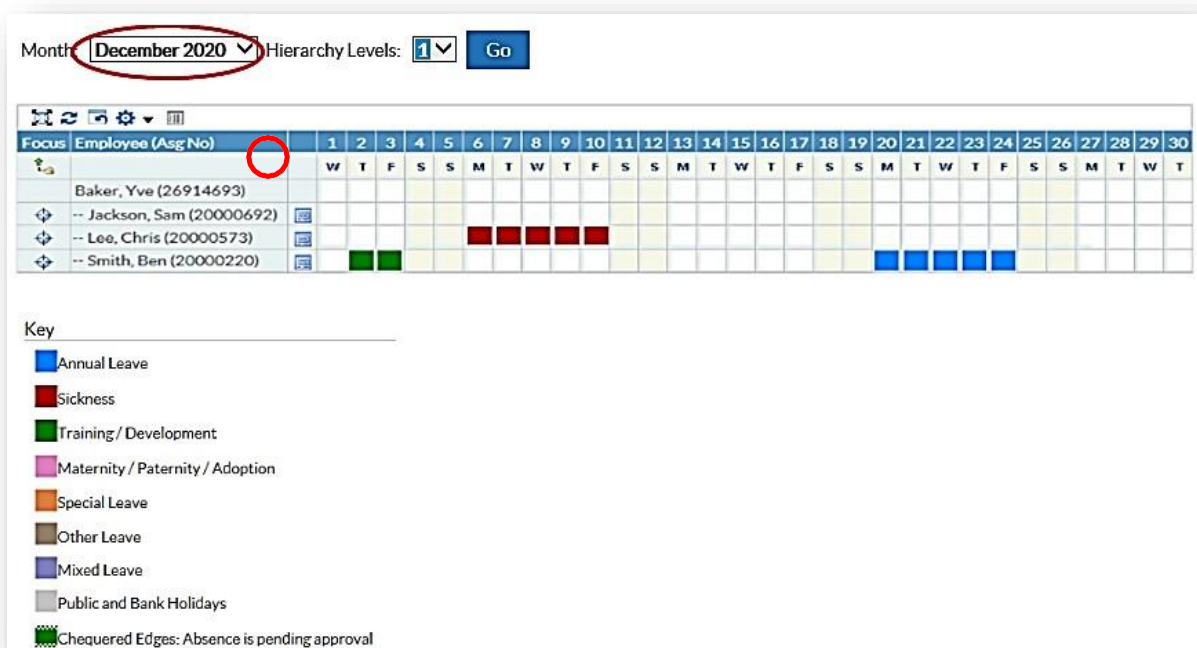
## Viewing Staff Absence


**All Annual Leave should be recorded in Employee On-line/Health Roster and not ESR.** Each month this data will interface to ESR and should be available on the ESR Absence Calander. From the Manager dashboard you can then access an absence calendar for each of your staff.

Under the Team Absence chart click on manage absence (as below).



The absence calendar hierarchy view below will be displayed. You can also change the display month or number of levels in the hierarchy you want to drill down to.



You can then click on the  icon circled above to view an individual absence Calander (as below).

[Printable Page](#)   [Absence Summary](#)

Employee Name  
Employee Number

Full Year   Month

Month/Year	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T							
Dec 2019							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
Jan 2020			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				
Feb 2020						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			
Mar 2020							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
Apr 2020			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					
May 2020						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	
Jun 2020	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							
Jul 2020			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				
Aug 2020						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	
Sep 2020	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							
Oct 2020				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			
Nov 2020						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		
Dec 2020	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						


The [Printable Page](#) button in the top right-hand corner will allow you to print.

The [Absence Summary](#) button in the top right-hand corner will take you to the absence summary page where you can access the details for each individual absence episode.

## Entering Return to Work discussion dates

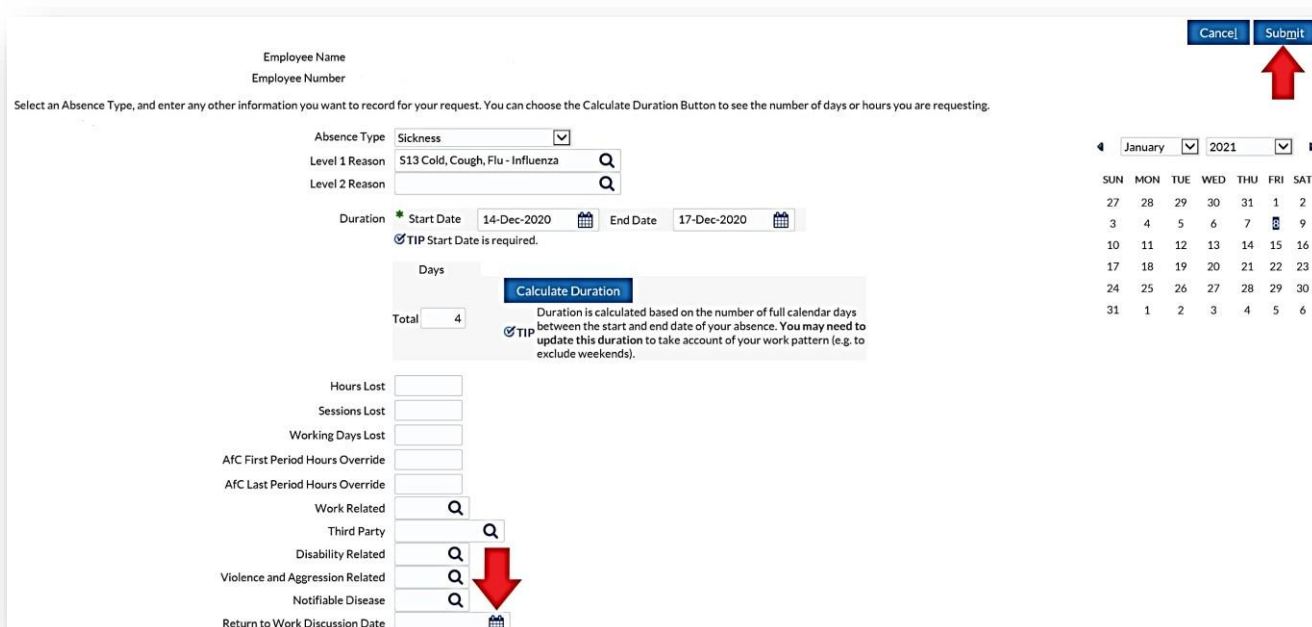
The Return to Work discussion date should be completed upon an employee's return to work following Sickness or Covid related absence.

You must first navigate to the individual absence episode by clicking the 'Absence Summary' button above.

You can then select the  icon next to the episode you want to update.

Click on the calendar icon in 'Return to Work Discussion Date' field

Enter the date the discussion was completed and click submit.



Employee Name  
Employee Number

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.

Absence Type: Sickness  
 Level 1 Reason: S13 Cold, Cough, Flu - Influenza  
 Level 2 Reason:   
 Duration: Start Date: 14-Dec-2020, End Date: 17-Dec-2020  
 TIP Start Date is required.

Days  
 Total: 4

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

Hours Lost  
 Sessions Lost  
 Working Days Lost  
 AFC First Period Hours Override  
 AFC Last Period Hours Override  
 Work Related  
 Third Party  
 Disability Related  
 Violence and Aggression Related  
 Notifiable Disease  
 Return to Work Discussion Date

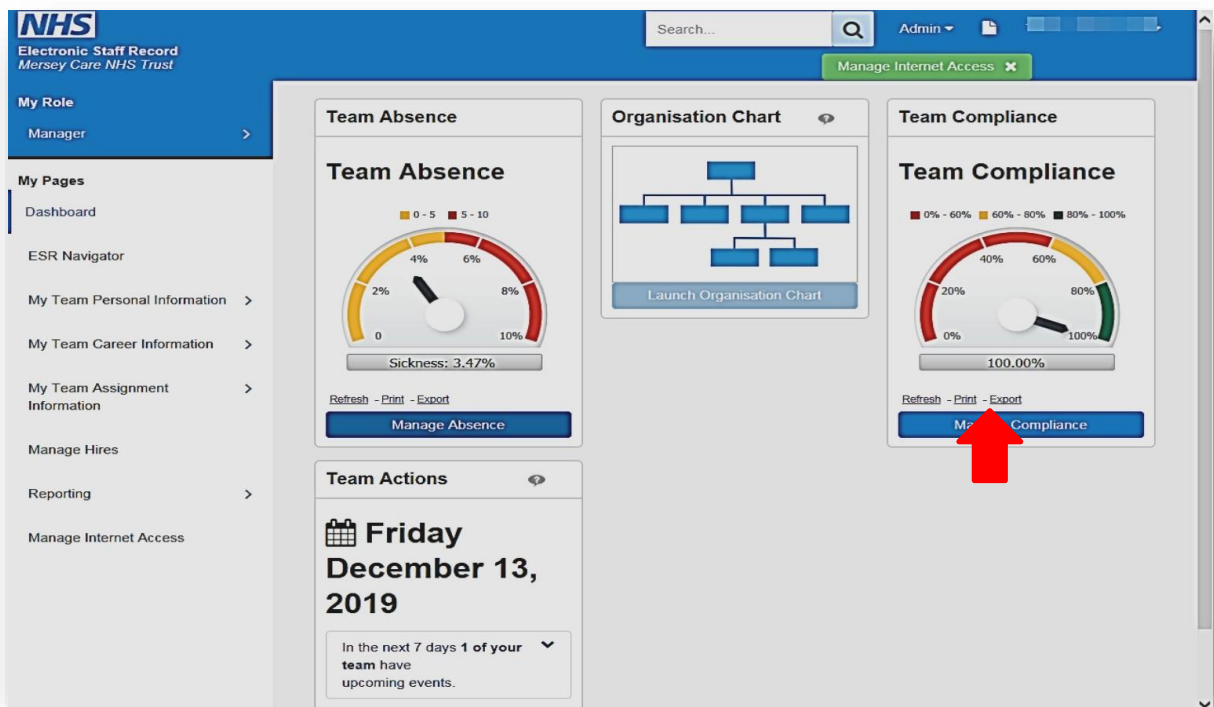
January 2021  

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	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	6



## Accessing Staff Training Competencies

From the **Manager Dashboard**, go to the **Team Compliance** portal and click in **Manage Compliance**



The Compliance and Competence Hierarchy View shows each of your team and their compliance percentage

To view an individual's compliance, select the  icon alongside their name. The page below will then be displayed.

Details	Competency Name	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning	Edit
>	350 LOCAL Adverse Incidents - e-learning (once only)	1 - Adverse Incidents		N	No Expiry	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL Brief Advice on Secondhand Smoke - e-learning (once only)			N	No Expiry	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL COMPLAINTS Once Only Core			N	No Expiry	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL Fraud Awareness - once only Core			N	No Expiry	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL Learning Disability Awareness 2019 (Once Only)			N	No Expiry	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL Role Specific (Interim) Basic PPE 2020 Core			N	08-Jun-2021	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 LOCAL Suicide Awareness/Prevention - 3 yearly			N	29-Aug-2021	<span style="background-color: green; width: 15px; height: 15px; display: inline-block;"></span>		
>	350 Demand and Capacity Modelling				No Expiry	<span style="background-color: blue; width: 15px; height: 15px; display: inline-block;"></span>		
>	830 LOCAL Bullying & Harassment				26-Jan-2032	<span style="background-color: blue; width: 15px; height: 15px; display: inline-block;"></span>		
>	830 LOCAL Complaint & Claims (Once only)				No Expiry	<span style="background-color: blue; width: 15px; height: 15px; display: inline-block;"></span>		

**Hide**

- Compliant with three months or more left
- Compliant with less than three months left
- Compliant, less than three months left, under way
- Not Compliant (may be expired or at a lower level or has never had the competence, check expiry date and level attained to see which)
- Not Compliant, under way
- Has the competence but it is not required
- Does not have the competence and it is not required

'No Expiry' in the expiry date field means the Employee has the competence without an end date i.e. Competence is required once only

## Additional Resources

Further guidance can be found on the ESR Hub: [Looking for help? - ESR Hub - NHS Electronic Staff Record](#) **YOU MUST BE LOGGED INTO ESR TO ACCESS THIS HELP**

If you have any concerns or queries, please contact [esradmin@merseycare.nhs.uk](mailto:esradmin@merseycare.nhs.uk)