

# **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:



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.

Lisement.	astensk (*) are required heids
Username"	(Example: 999JSMITH01)
Password*	
Forgotten   F	Request Username/Password   Unlock Account
	Log in via Username Password
Log in wit	Log in via Usemarne Password
Log in wit Access ESR button	Log in via Usemame Password th your Smartcard R by inserting your Smartcard and entering your PIN, and then selecting the 'Log in via Smartcard'



### 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.'

ectronic Staff Record ersey Care NHS Trust		Ay ESR Manager	Q Cymra	aeg/English • Accessibility I II
My Pages				
Dashboard		Announcements	Ð	My Pay Details •
Portal Content ESR Navigator	>		NHS Messay Care set loandrides That	
My Personal Information	>	Your Total Reward Statement (TRS) is due to be updated in August 2024 for the yea You will no longer be able to access your TRS for 22/23 after this time.	r 23/24. >	Email me when Payslip
My Pay & Rewards	>	Please print or save a copy of your statement for 22/23 before August 2024. This ca done on ESR.	in be	View My Payslins
My Learning			Click this pitture for more information.	View My P60s
My Compliance &				



### 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).

Role			
Nanager >	Team Absence	Organisation Chart 👳	Team Compliance
y Pages	Team Absence		Team Compliance
Dashboard	<b>0</b> - 5 <b>5</b> - 10		0% - 60% 60% - 80% 80% 100%
ESR Navigator	4% 6%		40% 60%
Talent Profile	2% 8%		20% 80%
Organisation Chart	Sickness: 0.91%	Launch Organisation Chart	98.15%
My Team Personal >	Refresh - Print - Export		Refresh - Print - Export
mornauon	Manage Absence	<b>_</b>	Manage Compliance
My Team Career	4		

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 <a href="mailto:esradmin@merseycare.nhs.uk">esradmin@merseycare.nhs.uk</a>

	Organization	200 Lakert Profile		,	hayla
21				Sant	Abarcal Samb
		Bond			
	G	James			
	G	Bond			
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#### 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.

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ous	Employee (Asg No)		1	2	3	4	5	6	7	8	9	10	11	12	13 1	14 1	15 1	6 1	7 18	19	20	21	22	23	24	25	26	27	28	29 3
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	Jackson Sam (2000692)	100	-	-	-	-		-							+	-	-	-		-	-									-
+	Lee, Chris (20000573)														-		-	-				-								-
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You can then click on the icon circled above to view an individual absence Calander (as below).



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Full Year	Mo	onth																																			
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Month/Year	м	т	W	Т	F	S	S	м	т	w	т	F	S	S	м	т	w	т	F	S	s	м	Т	w	т	F	S	S	м	Т	w	Т	F	s	S N	4 1	1
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 2	29 3	0 3	1
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	8	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	0 3	1
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					15	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	\$	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				
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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 2	29 3	0	
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	20	25	26	27	23	29	30	31					

Printable Page

The

button in the top right-hand corner will allow you to print.

#### Absence Summary

The 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 Wok 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											ł	1
ect an Absence Type, and enter any other information you want to record	l for your request. Y	You can choose the	Calculate Duration	on Button to see t	the number of days or l	hours you are requesting.						-
Absence Type	Sickness	$\checkmark$						1		000		
Level 1 Reason	S13 Cold, Cough,	Flu - Influenza	Q					January		2021		
Level 2 Reason			Q				SUN	MON	TUE	WED	THU	FRI
Dente	*			47.0 0000	-		27	28	29	30	31	1
Duration	Start Date 1	14-Dec-2020	End Date	17-Dec-2020			3	4	5	6	7	8
	O TIP Start Date is	s required.					10	11	12	13	14	15
	Days	-	-				17	18	19	20	21	22
		Calculate D	uration				24	25	26	27	28	29
	Total 4	©TIP between update t exclude v	the start and end his duration to ta weekends).	date of your abso ke account of you	ence. You may need to ur work pattern (e.g. to				-			
Hours Lost												
Sessions Lost												
Working Days Lost												
AfC First Period Hours Override												
AfC 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		<b>m</b>										



#### **Accessing Staff Training Competencies**

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

Electronic Staff Record			Search Q	Admin -
Mersey Care NHS Trust			Man	age Internet Access 🗙
My Role		Team Absence	Organisation Chart	Team Compliance
Manager	>			· · · · · · · · · · · · · · · · · · ·
My Pages		Team Absence		Team Compliance
Dashboard		0 - 5 🔳 5 - 10		<b>0</b> % - 60% <b>6</b> 0% - 80% <b>8</b> 0% - 100%
ESR Navigator		4% 6%		40% 60%
My Team Personal Information	>	2% 8%	Launch Organisation Chart	20% 80%
My Team Career Information	>	0 10%		100.00%
My Team Assignment	>	Refresh - Print - Export		Refresh - Print - Export
mornauon		Manage Absence		Ma Compliance
Manage Hires				
Reporting	>	Team Actions 📀		-
Manage Internet Access		🛱 Friday		
manage memory to obo		December 13		
		2019		
		2013		
		In the next 7 days 1 of your team have upcoming events.		

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



		• rier			
u C 🖸	ovee (Asg No)	Compliance Percent	3079		
ta la	Manager				
⇔ Sta ⇔ Sta	off Member A	··· ?) 📻 100.0% ?) 📻 100.0%			
Y					
Compl	iant with three months	or more left			
Compl	iant with less than three	e months left			
Compl	iant, less than three mo	nths left, under way			
Not Co	ompliant (may be expire	d or at a lower le			
	ompliant, under way				
Not Co					
Not Co Has the	e competence but it				
Not Co Has the Does n	e competence but it				

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

ail	s Competency Name 🔺	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning	Edit
	350 LOCAL Adverse Incidents - elearning (once only)	1 - Adverse Incidents		N	No Expiry		٩	1
	350 LOCAL Brief Advice on Secondhand Smoke - elearning (once only)			N	No Expiry		Q	1
	350 LOCAL COMPLAINTS Once Only Core			N	No Expiry		Q	1
	350 LOCAL Fraud Awareness - once only Core			N	No Expiry		Q	1
	350 LOCAL Learning Disability Awareness 2019 (Once Only)			N	No Expiry		Q	1
	350 LOCAL Role Specific (Interim) Basic PPE 2020 Core			N	08-Jun-2021		Q	1
	350 LOCAL Suicide Awareness/Prevention - 3 yearly			N	29-Aug-2021		Q	1
	350  Demand and Capacity Modelling				No Expiry		Q	1
	830 LOCAL Bullying & Harassment				26-Jan-2032		٩	1
	830[LOCAL Complaint & Claims (Once only)]				No Expiry		Q	1
	c Compliant with three months or more left Compliant with less than three months left Compliant, less than three months left, under way Not Compliant, leng be expired or at a lower level or has never had the competence, cher Not Compliant, under way Has the competence but it is not required	ck expiry date and level attained to see whic	h)					
	Does not have the competence and it is not required							
	Fronting the standard data field as seen also Fronting the also as such as such as such as							



### **Additional Resources**

Further guidance can be found on the ESR Hub: <u>Looking for help? - ESR Hub - NHS</u> <u>Electronic Staff Record YOU MUST BE LOGGED INTO ESR TO ACCESS THIS HELP</u>

If you have any concerns or queries, please contact <a href="mailto:esradmin@merseycare.nhs.uk">esradmin@merseycare.nhs.uk</a>