Annual Leave in ESR

From 1st April 2022 the ESR system will be used to determine leave entitlements for staff. Annual Leave entitlements for staff will be calculated by ESR on a daily basis in line with the revised annual leave policy, and data from ESR will then be used to inform the HealthRoster system.

This FAQ document has been compiled to provide answers to common questions in relation to this change. If viewing this electronically please click on the hyperlinks below to be taken to that question and answer.

FAQ's

Other Useful Resources (must be connected to Trust network)

**Annual Leave Policy** –   This link points to the annual leave policy available on the Staff Hub. The policy also contains the revised annual leave calculator should any manual leave calculations need to be made.

Annual Leave Staff Hub -   This link points to the new 'Annual Leave in ESR' pages of the staff hub.

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ALL STAFF

Q: **How do I check my leave entitlement in ESR?**

A: Access your ESR Employee Self Service account and from the Portal Landing page navigate to My Absence>Absence Summary, then select Entitlement Balances. The effective date defaults to today, but this can be changed to different dates in different leave years.

Remember a leave year is April to March.
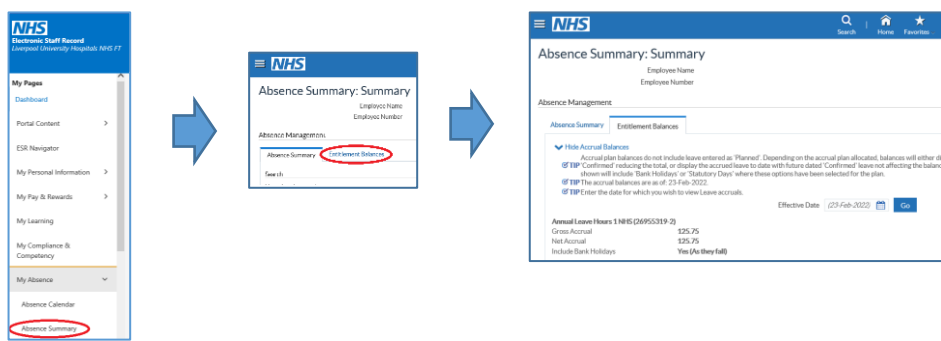
Q: **I think my entitlement may be incorrect. What do I do?**

A: If you believe your entitlement is incorrect this will likely be due to one or two factors.

Previous Service – If you think entitlements are incorrect due to missing previous service you should first check your ESR record using Employee Self Service.

Access your ESR Employee Self Service account and from the Portal landing page navigate to My Talent Profile. Scroll down the page to the Previous Employment section and click on 'Show'.

Previous reckonable service missing? Click here to raise an email to the Employment Team including the dates of the missing period of service and your employer at that time. Service details can then be sought via the IAT process and your record updated.

Please note that ESR has been used by the NHS for over ten years, however historic service which is more than ten years in the past may not be available in ESR. Any previous service which cannot be confirmed via ESR must be evidenced by the individual.

Aggregate Years & Days Service - If all previous NHS service is recorded against your ESR record and you disagree with the ESR generated leave entitlement figure there may be an issue with your aggregated years and days service. This is the combined number of years and days of reckonable NHS service prior to commencement in their current post with LUHFT. This cannot be accessed via Employee or Supervisor Self Service but is fundamental to annual leave calculations. Click here to raise an email to the Workforce Team, including that your service is recorded correctly, but you believe your entitlement is incorrect. Your record will then be reviewed.

Q: **What is classed as reckonable service for annual leave purposes?**

A: Any permanent or fixed term employment in the NHS is classified as reckonable service. This must be confirmed via the IAT (Inter Authority Transfer) process within ESR.

Any service which cannot be confirmed by the ESR IAT process must be evidenced by the employee in order to be included against their record.

NHS bank service does **not** count toward reckonable service for annual leave purposes.

Q: **How do I access my Employee Self Service account?**

A: Upon commencement new starters are provided with their ESR Employee Self Service login credentials and guidance on how to access the system as part of the onboarding process.

Should any users have forgotten their password they can use the forgotten password link on the ESR login page to request a password reset.

If you do not know your ESR username or password click here to raise an email to the Workforce Team including your name, date of birth, national insurance number and home address your details can be provided.

Q: **How do I submit leave requests or delete annual leave episodes?**

A: Annual Leave should be requested using either the HealthRoster or ESR systems dependant on which system is used to manage annual leave in your area.

If your area uses the HealthRoster system annual leave requests should only be submitted via this system. Annual Leave is then approved and recorded within HealthRoster. Approved episodes of leave are then transferred to ESR on a monthly basis therefore dual input to ESR is not required. If a period of leave has not yet passed the member of staff may delete it within EOL. For other instances staff will need to speak with their manager. For further information in relation to annual leave requests and management in HealthRoster please contact the Roster Team.

If your area uses ESR annual leave requests should be submitted via this system. As leave will be managed directly within the core workforce system no further action is required once leave has been requested and approved. For further information in relation to ESR and annual leave please refer to the relevant section on the Trust Intranet Staff Hub. Click here to go to the Employee Self Service intranet pages to view a video tutorial on how to submit or delete leave requests in ESR.

Q: **Will my entitlement change when my contracted hours change, or when I reach 5 or 10 years' service?**

A: ESR will automatically adjust annual leave entitlements as soon as a change of contracted hours is actioned. ESR also holds data relating to previous service it will automatically account for increases due after completion of 5 and 10 years' reckonable service therefore no additional actions are required should staff leave be managed via ESR.

For staff using HealthRoster, when contracted hours have been changed in ESR the Roster Team will manually update HealthRoster. As part of these updates annual leave entitlements in ESR will be reviewed and copied to the roster where necessary. Copying ESR entitlements will capture any changes in contracted hours, as well as increases owing to reaching 5 or 10 years' service milestones. Changes to HealthRoster can only be made after ESR has been updated.

Q: **I use Employee On Line to submit leave requests. Do I also need to submit leave requests to ESR?**

A: No. Dual input of leave requests to both ESR and HealthRoster is <u>not</u> required. An upload of absence data from HealthRoster to ESR is undertaken once a month. This transfer of absence data will be configured to also include annual leave episodes with effect from 1st April 2022.

Q: **I have checked my leave entitlement in ESR, but this is not appearing in my Employee On Line account?**

A: Leave entitlements will be entered to the HealthRoster by the Roster Team and these should then be visible when accessing Employee On Line. If annual leave entitlements are not showing in Employee On Line but are showing on ESR please contact the Roster Team so details can be added by clicking here.

Q: **Why do I have more than one entitlement value showing in ESR and Employee On Line?**

A: As entitlement values are calculated based on individual assignments, should you have more than one assignment you will therefore have an entitlement value for each assignment.

MANAGERS

Q: **How can I view the entitlements of staff within my hierarchy?**

A: You must have access to Supervisor Self Service and have staff beneath you in the ESR supervisor hierarchy. If this is in place access your ESR Supervisor Self Service account using your smartcard and from the Portal landing page click on 'ESR Navigator' then select 'Supervisor Self Service'.
Within the My Team Personal Information section click on 'Absence'.
Find the individual required and click on the Action icon.
Clicking on 'Entitlement Balances' will show the leave entitlement for the individual selected.
The effective date defaults to today, but this can be changed to different dates in different leave years.

Q: **How can I manually calculate leave entitlements for my staff when they start or leave?**

A: The updated Annual Leave policy contains a new Annual Leave Calculator which will calculate annual leave on a daily basis. This can be used to calculate part year leave entitlements in instances when staff commence or leave partway through the leave year.

Q: **Does this impact Annual Leave entitlements in HealthRoster?**

A: Yes, but in a positive way! It will no longer be necessary for managers to confirm to the roster team annual leave entitlements for their new starters as data will be sourced directly from ESR. Annual updates will be made in bulk at the beginning of the calendar year in readiness for the forthcoming leave year.
In instances when staff move units within the roster system, or change contracted hours, the Roster Team will manually update Annual Leave entitlement based on ESR data, therefore HealthRoster can only be updated after ESR.

Q: As a manager do I need to input annual leave to HealthRoster and ESR?

A: No. Dual input to both ESR and HealthRoster for Annual Leave or any other absence is <u>not</u> required. An upload of absence data from HealthRoster to ESR is undertaken once a month. This transfer of absence data will be configured to also include annual leave episodes with effect from 1st April 2022.

If you use HealthRoster to manage annual leave, record sickness and manage off duty for your team all of this information is transferred to ESR on a monthly basis. Should this same information also be input to ESR it will result in failed upload entries which then need to be manually reviewed.

Q: How do I notify you of any Carry Over of leave for my team from one leave year to the next?

A: Every year the Workforce and Roster Team will work collaboratively to collate any confirmed carry over of leave hours from one leave year to the next.

If managers use <u>HealthRoster</u> to manage their teams' leave and approve any carry forward leave hours for their staff they will be sent a carry forward template by the Roster Team to confirm carry forward hours.

If managers use <u>ESR</u> to manage and approve leave for their team a template will be sent via email to ESR supervisors for any carry forward leave hours to be confirmed.

Q: How do I access my Supervisor Self Service account?

A: ESR Supervisor Self Service can only be accessed using a smartcard. Users must also be placed in the supervisor hierarchy with staff reporting to them directly. If Supervisor Self Service access is required approval must be provided by the immediate manager of the required supervisor.
Should any staff with managerial responsibilities require access their managers should contact the [Workforce Team](#) to initiate set up.