

ESR Annual Leave Entitlement Report via Supervisor Self Service

All annual leave entitlements are generated by ESR, therefore it is possible for those with Supervisor Self Service access to report on available balances at a specified point in time.

Follow the steps below to find out how much entitlement your team members are due, how much has been taken* and remaining balances*.

***NOTE FOR THOSE WHO USE HEALTHROSTER TO MANAGE LEAVE. ROSTER LEAVE DATA IS TRANSFERRED TO ESR ONCE A MONTH COVERING THE LAST FULL MONTH. ESR WILL THEREFORE ONLY SHOW TAKEN LEAVE UP TO THE END OF THE LAST COMPLETE MONTH AND WILL NOT SHOW ANY PLANNED LEAVE.**

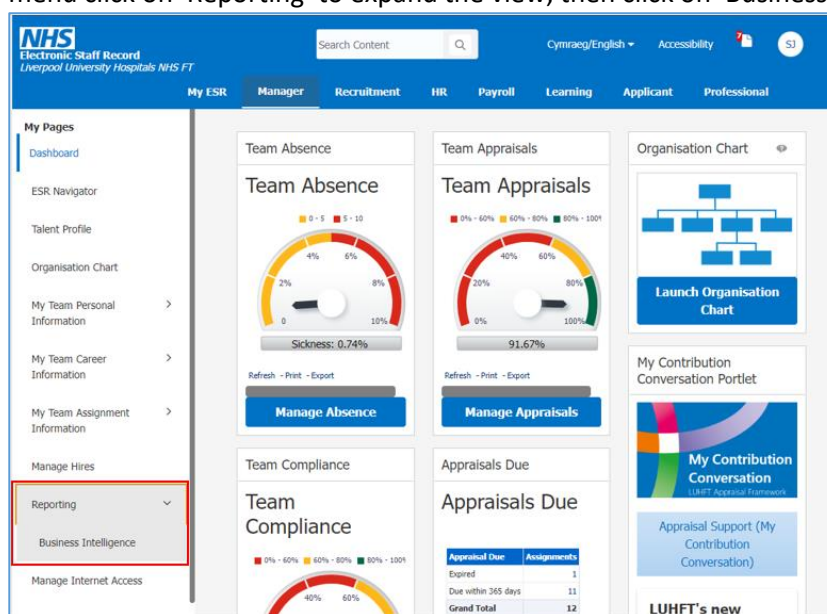
You will need:

- Supervisor Self Service access attached to your ESR user account.
Supervisor Self Service gives access to the required Business Intelligence Dashboard.
- An active smartcard linked to your ESR user account.
Supervisor self service is locked down to access only via Smartcard.
- Correct staff sitting beneath you in the supervisor hierarchy.
Business Intelligence Dashboards restrict data shown to only include only those who sit within the hierarchy of the user running the report.

Should there be any issues with any of the above please contact workforce@liverpoolft.nhs.uk and the team will provide support.

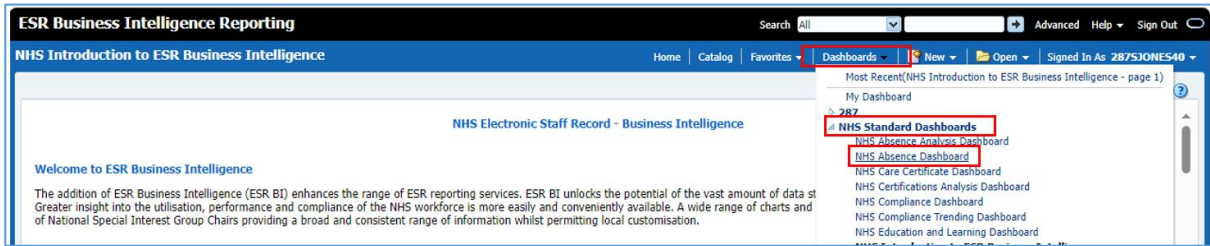
Running an Annual Leave Entitlement Report from ESR

1. Access ESR (using your smartcard)
2. Click on the Manager tab.
3. On the left hand menu click on 'Reporting' to expand the view, then click on 'Business Intelligence'

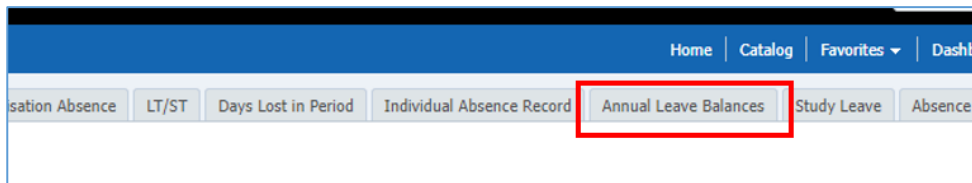


4. A new tab will open in your web browser window entitled 'ESR Business Intelligence Reporting'.

- Click on 'Dashboard' in the top blue bar, select 'NHS Standard Dashboards' ensuring the view has been expanded by clicking on the arrow head to the left. Click on 'NHS Absence Dashboard'



- When the 'NHS Absence Dashboard' loads you will see a number of tabs at the top of the dashboard. Click on the tab entitled 'Annual Leave Balances'

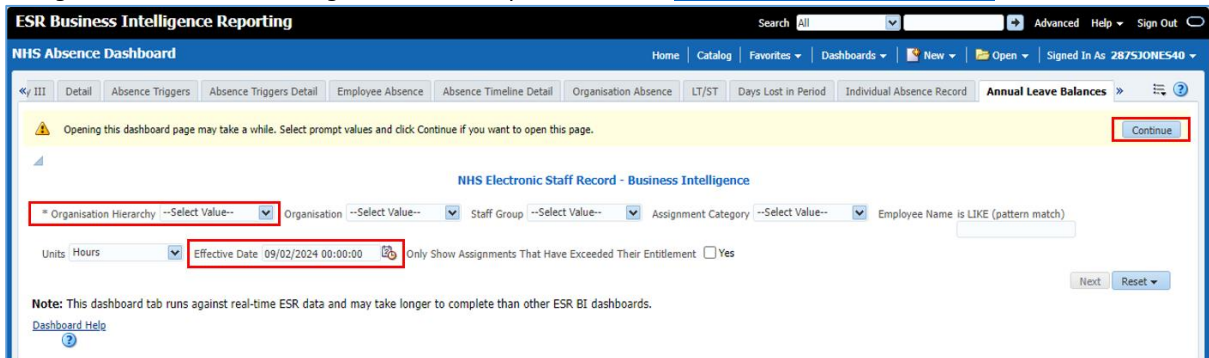


- You will now be presented with the user defined parameters for the report. To report on annual leave entitlements, taken leave and remaining balances for all the staff who sit within your supervisor hierarchy apply the following parameters:

Organisation Hierarchy : Must always set as '287 Merged Hierarchy'
Effective Date: 31st March YYYY

Once parameters have been set click on the 'Continue' button.

It is possible to report on specific areas or grouped areas by selecting the relevant ESR Organisation(s) or branches of the organisation structure. For guidance on this please contact workforce@liverpoolft.nhs.uk.



- The report will complete and show details based on the parameters which have been set. The data can be exported to Excel, Word, PDF or CSV for review outside of ESR. To export the data scroll to the foot of the table in the middle and click on the 'Export' link. Select the relevant format (Excel is best for most dashboard). The

file will appear as a download in your browser.

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

Please be mindful when downloading any data from ESR, adhering to relevant Data Protection principles.