

Annual Leave Recording in ESR Self Service

- If your area is live on ESR then it is compulsory to utilise the system to record your A/L. The only staff who are not required to use ESR to record A/L are those staff with rosters managed via RosterPro.
- **ESR should be used as a recording tool rather than a requesting tool.** We do not suggest that staff request A/L via ESR prior to discussing that request with their line manager. Please do not feel you have to change the method of A/L requests in your area; e.g. email or verbal conversations with staff, ESR simply offers us a new medium of recording A/L - electronically rather than on paper.
- Please remember to check your entitlement balance and ensure that it is correct in ESR. If you have any queries regarding your entitlement balance please feel free to query it. Please remember that ESR only has details of your current employment history within Cardiff and Vale, if your entitlement is incorrect this may be due to any previous aggregated NHS service within another Health Board/NHS provider.
- **Gross Accrual** = what you started with.
- **Net Accrual** = what you have remaining (please note that any purchased A/L will be added automatically to your Net Accrual via Payroll).
- Your A/L entitlement for the year includes your bank holiday entitlement. With the implementation of ESR we are all now responsible for booking out the bank holidays ourselves.
- Staff should only book bank holidays if they would have worked this day as part of their normal shift pattern e.g. part time staff who do not work Mondays should never book a bank holiday Monday off.
- When booking bank holidays please remember to book off the normal amount of hours that you would have worked during that shift.
- As there are ten bank holidays during 2015/16 full time A/L entitlements for the year are as follows;
Over ten years service = 322.5 hours.
Over five years but under ten years service = 292.5 hours.
Under five years service = 277.5 hours.
Please remember that these totals will be pro-rata for part time staff.
- When booking A/L it is important that you do not change the Absence Status from confirmed to planned. **Managers please note**; planned A/L does not deduct from staff members entitlement balance. If any A/L has been entered as planned it must be changed to confirmed.
- Please remember that it is not necessary to enter start and finish times for a period of A/L. More importantly, simply ensure that the correct amount of hours are entered in the hours box.
- ESR works on the premise that a standard shift is 7.5 hours long. However, in a large organisation such as ours we have multiple shift patterns consisting of many different lengths. If you work anything other than 7.5 hours per shift please do not rely upon the 'calculate duration' option, in cases such as this simply enter the required amount of hours in the box manually. Please note that if booking a two week period of A/L do not use the calculate duration button as this will include any weekends during this period in its calculation.
- When booking anything other than 7.5 hours A/L per day, please note that upon clicking 'next' the system flags up a warning message. **This is just a warning and not an error.** ESR is just asking if, as you requested something other than the standard 7.5 hours, you are sure you have selected the correct amount of hours and do you still wish to proceed.

- Please remember that until the Absence Approval Status is 'Approved' the time requested will not be removed from staff members entitlement balances. Any A/L that is classed as pending approval will not have been taken into account in staff members remaining net accrual.
- **Note to managers;** following on from the previous point, it is important therefore to ensure that you keep up to date with any A/L requests in your notifications.
- Providing the date has not yet passed staff can delete/amend their own A/L. However, should that date have passed and the staff member did not actually take A/L managers will need to contact either Kevin Taylor or Vi Corlett in order to get these hours reimbursed to staff. This is also relevant to staff who are sick during periods of A/L and managers have deemed it appropriate that staff be reimbursed the A/L.