

Requesting and Approving Annual Leave on ESR

GUIDANCE FOR MANAGERS & STAFF ON ESR SELF SERVICE

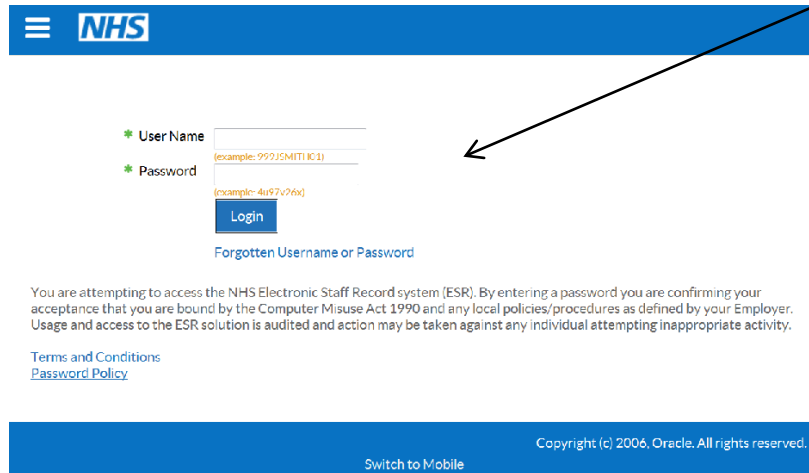


How do I know if I should use ESR to request annual leave?

- All areas now have ESR Self Service except Medicine and some Exec areas.
- Where the Electronic Staff Record (ESR) has been rolled out and staff have Employee Self Service, this must be used to request and approve Annual Leave.
- If ESR self service has not been rolled out to a department, all Annual Leave requests must be submitted on the Annual Leave Request Form attached to the Annual Leave Procedure
- Any local recording systems used must be in addition to the standard form/ESR, not instead of it.
- There are additional guidelines and on-line step by step guides on all elements of using ESR on the UHB website:
<http://www.cardiffandvaleuhb.wales.nhs.uk/esr-guides>



1. Start by logging into ESR



NHS

* User Name
(example: 999JSMITH101)

* Password
(example: 4u97<76x)

Login

[Forgotten Username or Password](#)

You are attempting to access the NHS Electronic Staff Record system (ESR). By entering a password you are confirming your acceptance that you are bound by the Computer Misuse Act 1990 and any local policies/procedures as defined by your Employer. Usage and access to the ESR solution is audited and action may be taken against any individual attempting inappropriate activity.

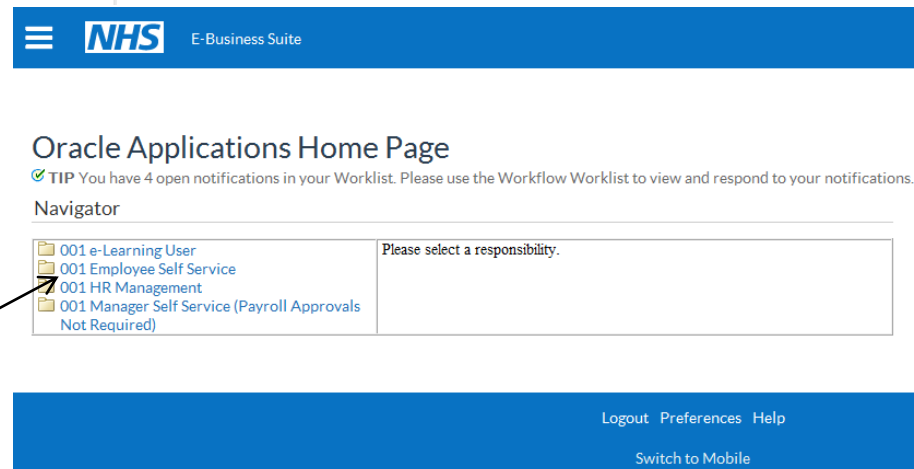
[Terms and Conditions](#)
[Password Policy](#)

Switch to Mobile

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Then select
'Employee
Self Service'



NHS E-Business Suite

Oracle Applications Home Page

✓ TIP You have 4 open notifications in your Worklist. Please use the Workflow Worklist to view and respond to your notifications.

Navigator

001 e-Learning User 001 Employee Self Service 001 HR Management 001 Manager Self Service (Payroll Approvals Not Required)	Please select a responsibility.
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Logout Preferences Help

Switch to Mobile

3. Select 'Absence Summary' then 'Create Absence'

Navigator

- 001 e-Learning User
- 001 Employee Self Service
- 001 HR Management
- 001 Manager Self Service (Payroll Approvals Not Required)

My ESR

- Notifications
- All Actions Awaiting Your Attention

My Personal Information

- Personal Information
- Contacts
- Qualifications
- Sexual Orientation
- Religious Belief
- Registrations and Memberships
- Disability Information

My Pay & Rewards

- Payslip
- Opt Out of Printed Payslip/P60
- Online P60
- Bank Account
- Total Reward Statement

My Learning

- Learning

My Compliance & Competency

- Compliance and Competency

My Absence

- Absence Calendar
- Absence Summary

My Appraisals & Reviews

- Appraisals and Reviews

My Employment

- Employment Information
- Medical and Dental Job Plans

My Property Register

- Property Register



NHS My Absence

Absence Summary: Summary

Employee Name
Employee Number

Absence Summary | Entitlement Balances

Search

Note that the search is case insensitive

Absence Type

Approval Status

Start Date

End Date

[Go](#) [Clear](#)

[Create Absence](#) [Export Absences](#) [Individual Calendar](#) [Previous](#) 1-10 [Next 10](#)

Start Date	End Date	Absence Type	Absence Category	Days	Hours	Duration	Approval Status	Details	Update	Delete	Add to Outlook
01-Jan-2018	01-Jan-2018	Annual Leave	Hours 1	Annual Leave	8	Approved					
26-Dec-2017	26-Dec-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
25-Dec-2017	25-Dec-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
05-Nov-2017	05-Nov-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
02-Nov-2017	02-Nov-2017	Annual Leave	Hours 1	Annual Leave	6	Approved					
28-Aug-2017	28-Aug-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
17-Aug-2017	17-Aug-2017	Annual Leave	Hours 1	Annual Leave	6	Approved					
16-Aug-2017	16-Aug-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
15-Aug-2017	15-Aug-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					
14-Aug-2017	14-Aug-2017	Annual Leave	Hours 1	Annual Leave	8	Approved					

[Create Absence](#) [Export Absences](#) [Individual Calendar](#) [Previous](#) 1-10 [Next 10](#)

5. Enter your absence details as follows

- a. click on the arrow next to absence type and select 'Annual Leave Hours 1'

- a. Enter the start and end dates
(n.b. if you work regular 7.5 hour shifts ESR will automatically calculate the duration, if you work irregular hours you may need to update this calculation)

- c. Click 'Next'

My Absence

Home Logout Preferences Help

Create Absence: Enter Absence Details

Cancel Next

Employee Name
Employee Number

Select an Absence Type, and enter any other information you want to request for your request. You can choose the Calculate Duration Button to see the number of days or hours you are requesting.
* Indicates required field

Absence Type
Absence Reason
Duration

Start Date
End Date
Start Time
End Time

TIP Start Date is required.
Days Hours

Calculate Duration

Total

Comments

View Entitlement Balances
View Entitlement Balance

Cancel Next

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	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



6. Click either of the 'submit' buttons - your request will then be sent to your line manager for approval

Create Absence: Review

Employee Name :
Employee Number :

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Absence Details

	Proposed
Absence Status	Confirmed
Absence Type	Annual Leave Hours 1
Absence Category	Annual Leave
Absence Reason	Annual Leave
Start Date	03-Jul-2017
End Date	05-Jul-2017
Hours	22.5

View Entitlement Balances

[View Entitlement Balance](#)

Approvers

Details	Approver	Status	Delete
Show			

Comments to Approver

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)



7. If you make a mistake or want to cancel your annual leave you can change it as long as the date has not passed

- a. Log on and go to absence summary as described in steps 1-3
- b. You can change or cancel annual leave by clicking on the 'update' or 'delete' icons next to the relevant date
(n.b. you can only do this once your manager has approved the request)
- a. If the date has already passed you will need to contact the ESR team for help

Absence Summary Entitlement Balances

Search

Note that the search is case insensitive

Absence Type

Approval Status

Start Date 

End Date 

Go Clear

Create Absence Export Absences Individual Calendar

Previous 1-10 Next 10

Start Date	End Date	Absence Type	Absence Category	Duration		Approval Status	Details	Update	Delete	Add to Outlook
				Days	Hours					
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Create Absence Export Absences Individual Calendar

Previous 1-10 Next 10



8. To check how much annual leave you have left click on the 'entitlement balances' tab

Absence Summary **Entitlement Balances**

Search

Note that the search is case insensitive

Absence Type

Approval Status

Start Date 

End Date 

Previous 1-10 Next 10

Start Date	End Date	Absence Type	Absence Category	Days	Hours	Approval Status	Details	Update	Delete	Add to Outlook
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14-Aug-2017	14-Aug-2017	Annual Leave	Hours 1	Annual Leave	8	Approved				

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Absence Summary: Summary

Employee Name
Employee Number

Absence Summary **Entitlement Balances**

▼ Hide Accrual Balances

✓ TIP Accrual plan balances do not include leave entered as 'Planned'. Depending on the accrual plan allocated, balances will be entered as 'Confirmed' reducing the total, or display the accrued leave to date with future dated 'Confirmed' leave not a Gross figure shown will include 'Bank Holidays' or 'Statutory Days' where these options have been selected for the plan

✓ TIP The accrual balances are as of: 24-May-2017.

✓ TIP Enter the date for which you wish to view Leave accruals.

Effective Date 

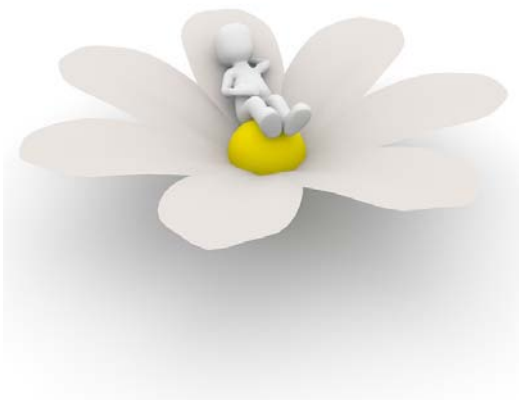
(example: 24-May-2017)

Annual Leave Hours 1 NHS (10607975)

Gross Accrual 252

Net Accrual 64

Include Bank Holidays Yes (As they fall)



This will show you how much Annual Leave you are entitled to, and how much you have left