Electronic Staff Record

Buy/Sell Annual Leave

This guide will provide advice about one way in which NHS organisations can manage the process for buying and selling annual leave. This operation can be run in different ways depending on the needs of the trust hence, the following is one viable option but these steps should not be read as mandatory but rather as best practice.

The following guidance summarises one option available to NHS organisations; these steps should not be read as a best practice process. An example of the form is shown below.

Common Process to Buy or Sell

PERSONALISED ANNUAL LEAVE
REQUEST FORM

Name:

Job Title:

Area:

Holiday year:

Normal Entitlement in hours: _____ (Excluding Bank Holidays)

Buy _____ Hours

Sell _____ Hours

Employee Signature: ....

Date: ....

Manager's Signature ....

Date: ....

For HR Use only

Copy placed on employees file

It is recommended that the employee has no pending annual leave requests when selling or buying annual leave, so that any calculations are based on an actual figure (and not a predicted one).

Managers must confirm these conditions are met, prior to approving the request by accessing: **Manager Self Service> My Team Personal Information> Absence> Identify Employee and Select Action.**

Once an application form has been completed and approved it would then need to be sent to the relevant department i.e. HR/Payroll Team, so that entitlements for that employee can be amended.

Professional users can use several URPs to confirm entitlement. One valid pathway would be: **Absence Administration> Absence> Search for employee.**
Professional users will not be able to view annual leave requests which are in progress hence, you may wish to request managers for a screen shot of the 2 screens below (absence summary details) as proof.

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How to make changes to accruals to reflect to buying or selling annual leave on payroll.

On the employee's record:

First, the yearly entitlements will need to be adjusted. More annual leave hours will need to be added, if the employee bought annual leave but, hours will need to be subtracted if the employee sold annual leave.

This will make sure that the employee will see the remaining entitlements correctly.
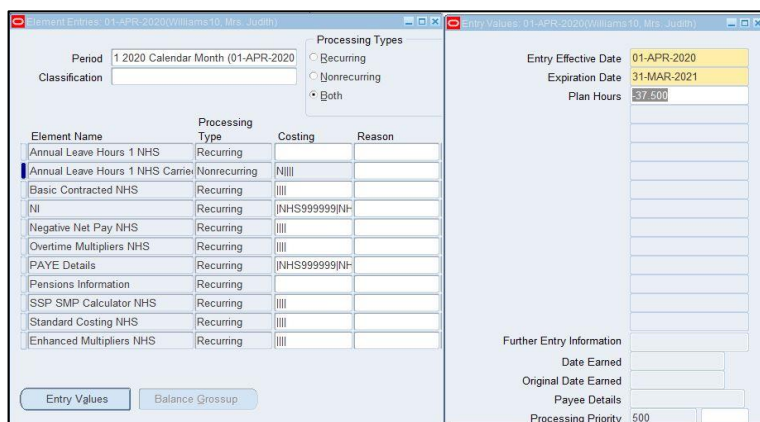
A new "Annual Leave Hours (select relevant plan) Carried Over" element will need to be added. Prior to opening the employee's record, make sure to date track to the employee's start date (if the employee joined the organisation that year, or from the 1st of April (beginning of the financial year) if the employee was already a part of the organisations at the beginning of the financial year.

Choose the correct assignment, click on "Entries", click on the "New" icon, click on "…", select the "Annual Leave Hours # Carried Over" correspondent to the assignment. And press "ok". Example: if the assignment's annual leave entitlements were set at the "Annual Leave Hours **2** NHS" you will need to choose "Annual Leave Hours **2** Carried Over".

Once the new row has been added, choose "Entry Values", Input the effective date and expiration date, and either add (buy annual leave) or subtract (sell annual leave) the amount of hours
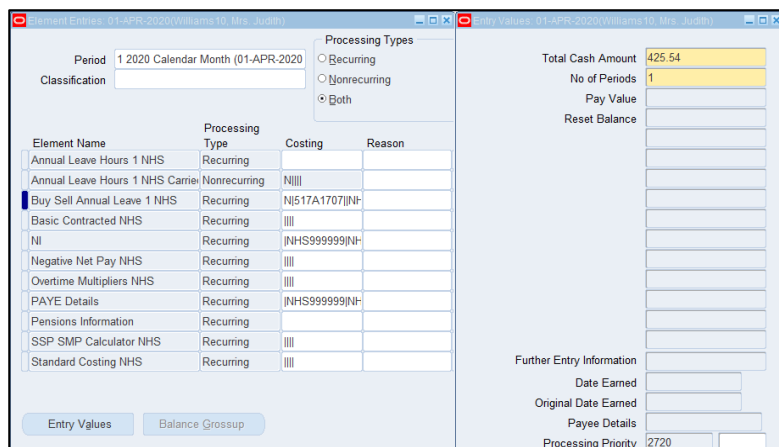
For the second change, we will need to make sure the employee's pay will be updated according to these changes.

Within the same assignment where the previous change took place, press the "New" icon to add an additional element. Choose the "Buy Sell Annual Leave 1 (or 2) NHS". Input the required information and press ok.

Input the correct information and press ok.

Press the "Entry Values" and input the cash value that is being sold (enter as a positive) or being bought (enter as a negative). If annual leave is being sold this would be entered as a lump sum over 1 period, if it is being bought this may be deducted over several periods, the agreed number would need to be entered in the number of periods field. Example: If "Total Cash Amount" = -£50 and "No of Periods" = 5 it means that £10 will be deducted over the next 5 payroll periods.

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Next steps?

Firstly, you need to contact your NHS ESR Functional Account Manager who can help advise on which of the options is most suitable for you to progress. Your NHS ESR Functional Account Manager details can be found on the ESR Hub. Details for your regional contacts can be found via the links below:-

- [London](#)
- [South of England](#)
- [Midlands and East of England](#)
- [North of England](#)
- [Wales](#).

Interested in implementing buying / selling annual leave in ESR? Your NHS ESR Functional Account Manager can talk to you about how to do this.

Before you get started, why not access our helpful guides on our support sites by clicking [here.](#)