


UN3006 1 of 4 16 March 2021	Electronic Staff Record Programme <b>USER NOTICE</b>	
<b>Title</b>	AfC Overtime payments during annual leave retrospective pay	
<b>Purpose</b>	<b>To provide guidance to English ESR Organisations on the retrospective pay arrangements for overtime payments during annual leave</b>	
<b>Intended Audience</b>	<b>All English ESR Organisations</b>	

## SUBJECT

Guidance on how to prepare for the retrospective pay arrangements for overtime payments due during annual leave.

## DETAIL

An agreement has been reached by the NHS Staff Council to resolve claims linked to pay entitlements, in respect of holiday pay under the NHS terms and conditions of service (Agenda for Change). Further details can be found on: <https://www.nhsemployers.org/pay-pensions-and-reward/nhs-terms-and-conditions-of-service---agenda-for-change/nhs-terms-and-conditions-of-service-handbook/overtime-payments-and-pay-during-annual-leave>


The retrospective pay arrangements are for overtime and additional hours paid, and cover the period 1st April 2019 to 31st March 2021. For an employee to be eligible the following criteria must be met:

- be employed by an NHS Employer on 31st March 2021
- must have received payments for overtime/additional hours in a minimum of 4 months out of 12 months in the period 1st April 2019 to 31st March 2020 and/or 1st April 2020 to 31st March 2021
- not already received payment for overtime/additional hours during annual leave in the timeframe stated

Any staff meeting the eligibility will be entitled to a payment of 16% of the total earnings for overtime and/or additional hours paid.

Payment can be for either or both financial years. The payment is for substantive staff and does not apply to bank staff. Retrospective payments made will not attract deductions for pension.

The following information is provided to assist users in preparing the information required in order to make the retrospective payment through the system.

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## ACTION REQUIRED

To support users in managing this process, we are developing a new report to help identify those employees impacted – the Annual Leave Overtime Correction report. When it is available users will be able to run the Annual Leave Overtime Correction report within the NHS Payroll Dashboard in ESR BI to identify staff that may be eligible to receive a payment. We currently plan to make the report available to users no later than the end of March 2021 however a user notice will be circulated to advise of its availability.


The report will identify assignments that are eligible for a payment of 16 percent of the total earnings for overtime and/or additional hours paid.

It will separately identify the combined value of the eligible elements, 16 percent of the value (which is due to be paid), as well as the sum of these two amounts to enable users to correctly process back pay for overtime payments.

Users will be able to select local elements if required, however by default all standard applicable elements will be included within the available dashboard prompt.

The NHS Payroll Dashboard will be made available to the following URP holders:

- XXX BI Administration
- XXX Finance Administration
- XXX Payroll Administration
- XXX Payroll Audit
- XXX Payroll Super Administration

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NHS Electronic Staff Record - Business Intelligence

Period End Date: Between 01/04/2019 00:00:00 - 31/03/2020 00:00:00 | Element Name: (All Column Values) | OT/Additional Elements: Additional Basic Pay | Organisation Name: (All Column Values) | Employee Number: --Select Value-- | Assignment Number: --Select Value-- | Person Type: Employee and Appl | Employee Person Type: Employee | Payroll Name: --Select Value-- | Assignment Status: NULL,Active,LibAct | Assignment Category: NULL,External Learn | [Apply](#) | [Reset](#)

Employee Name	Employee Number	Assignment Number	Organisation Name	Spinal Point	Pay Scale	Occupation Code	Period End Month	Hours Contracted	Hours Worked	FTE Contracted	FTE Worked	Basic Pay	Earnings	Combined OT/Add Hr	16% of Amount	Combined OT/Add Hr + 16%
190	XR03	NSA	2020-MAR	78.21	79.71	0.48	0.49	8831.80	€33.75	€15.95	€2.55	€18.50				
190	XR03	NSA	2020-JAN	78.21	80.21	0.48	0.49	8831.80	€40.11	€21.27	€3.40	€24.67				
190	XR03	NSA	2020-FEB	78.21	80.71	0.48	0.50	8831.80	€47.53	€26.59	€4.25	€30.84				
190	XR03	NSA	2019-SEP	78.21	80.46	0.48	0.49	8831.80	€31.25	€23.93	€3.83	€27.76				
190	XR03	NSA	2019-OCT	78.21	80.71	0.48	0.50	8831.80	€69.51	€26.59	€4.25	€30.84				
190	XR03	NSA	2019-NOV	78.21	81.96	0.48	0.50	8831.80	€60.82	€39.88	€6.38	€46.26				
190	XR03	NSA	2019-MAY	78.21	82.21	0.48	0.50	8831.80	€46.67	€42.54	€6.81	€49.35				
190	XR03	NSA	2019-JUN	78.21	78.46	0.48	0.48	8831.80	€22.55	€2.66	€0.43	€3.09				
190	XR03	NSA	2019-JUL	78.21	82.46	0.48	0.51	8831.80	€70.32	€46.30	€7.23	€52.43				
190	XR03	NSA	2019-DEC	78.21	84.96	0.48	0.52	8831.80	€88.54	€71.79	€11.49	€83.28				
190	XR03	NSA	2019-AUG	78.21	79.21	0.48	0.49	8831.80	€27.38	€10.63	€1.70	€12.33				
190	XR03	NSA	2019-APR	78.21	78.36	0.48	0.48	8831.80	€64.23	€1.57	€0.25	€1.82				
60	XR02	HR	2019-SEP	162.95	167.45	1.00	1.03	€1,471.00	€60.94	€60.94	€9.75	€70.69				
60	XR02	HR	2019-OCT	162.95	167.45	1.00	1.03	€1,471.00	€204.38	€60.94	€9.75	€70.69				
60	XR02	HR	2019-NOV	162.95	164.95	1.00	1.01	€1,471.00	€27.08	€27.08	€4.33	€31.41				
50	XR02	HR	2019-JUN	162.95	168.70	1.00	1.04	€1,471.00	€77.86	€77.86	€12.46	€90.32				
50	XR02	HR	2019-JUL	162.95	167.45	1.00	1.03	€1,471.00	€60.94	€60.94	€9.75	€70.69				
60	XR02	HR	2019-DEC	162.95	170.45	1.00	1.05	€1,471.00	€85.62	€101.56	€16.25	€117.81				
50	XR02	HR	2019-APR	162.95	167.45	1.00	1.03	€1,471.00	€60.27	€60.27	€9.64	€69.91				
470	XR07	SIG	2020-MAR	104.29	109.29	0.64	0.67	€2,334.51	€131.07	€111.93	€17.91	€129.84				
470	XR07	SIG	2020-JAN	104.29	109.29	0.64	0.67	€2,334.51	€131.07	€111.93	€17.91	€129.84				
470	XR07	SIG	2020-FEB	104.29	110.29	0.64	0.68	€2,334.51	€47.70	€208.63	€42.98	€311.61				
470	XR07	SIG	2019-MAY	104.29	124.29	0.64	0.76	€2,334.51	€81.33	€496.85	€71.99	€522.94				
470	XR07	SIG	2019-JUN	104.29	114.87	0.64	0.71	€2,334.51	€115.72	€354.37	€56.70	€411.07				
470	XR07	SIG	2019-JUL	104.29	128.46	0.64	0.79	€2,334.51	€320.50	€541.06	€86.57	€627.63				

Rows 1 - 25 | [Refresh](#) | [Print](#) | [Export](#) | [Add to Briefing Book](#)


We are working through the development requirement to provide an element for this payment to be made and to be nationally reported on. We advise users to prepare the data for payment using the reporting as described above, once it has been made available. A separate User Notice will be issued with further guidance on the next steps to take once the element has been made available in the system.

**Please note that as this is a 'one-off' settlement payment, retro should not be used to calculate payments to be made.**

## FURTHER INFORMATION

Where local elements are used to make payment for overtime/additional hours these will need to be considered when determining the payment due.

Arrangements will need to be made locally to pay arrears to staff that have moved between NHS Employers or left after 31<sup>st</sup> March 2021 but may be eligible to receive pay.

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We are continuing to work with NHS Employers on how ESR may be used to support the future payment position. Once we are in receipt of a full and final requirement we can assess the system impact and determine a suitable deployment target date.

#### **NEXT UPDATE**

None