


UN3444 1 of 3 9 <sup>th</sup> May 2024	Electronic Staff Record Programme USER NOTICE	
<b>Title</b>	Partial Retirement Frequently Asked Questions	
<b>Purpose</b>	To provide organisations with guidance on partial retirement FAQs	
<b>Intended Audience</b>	All Payroll, Pensions and HR ESR Users	

## SUBJECT

Frequently asked questions for managing partial retirement through ESR.

## DETAIL

Further to UN3364 and the change in legislation that was introduced in April 2024 for those employees who have chosen to take partial retirement, this User Notice is to provide some guidance on the frequently asked questions we have received for managing partial retirement.

The links included in the questions can be found in the [ESR User Manual](#) on the [ESR Hub](#), (Users need to be logged into ESR to access the ESR User Manual).

### Frequently Asked Questions

*Q. How do I record that an employee has taken partial retirement?*


A. In the Additional Assignment Details DFF, the Flexible Working Pattern field now has the option for Partial Retirement to be selected from the List of Values. Employees are also able to select this reason when submitting their Flexible Working request via Employee Self Service.

*Q. How can I track when an employee taking partial retirement has reached the end of the 12-month initial period?*

A. This can be done by entering a date in the Fixed Term field on the Additional Assignment Details DFF, or by recording the detail in the [Diary Reminder Form](#).

*Q. Do I need to create a new assignment to pay non-pensionable overtime?*

A. It is not necessary to create a new assignment, as detailed in UN3364, the [ESR PAD Manual](#) contains a list of all the pensionable and non-pensionable elements available in the system that can be used to pay non-pensionable payments on the existing assignment. There is also the option to create [Local Elements](#) as required.

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*Q. I have a part time employee who has taken partial retirement, how do I pay them non-pensionable overtime for the additional hours up to full time that they have worked?*


A. As above the full list of pensionable and non-pensionable elements are available in the ESR Pad Manual. To give an example, the element Overtime NR NP NHS could be used with Plain Time OT Pay NHS selected from the lookup table, this is a non-pensionable payment and will pay overtime at a flat basic pay rate.

*Q. How do I pay overtime to a full-time employee?*

A. There is no change to the way overtime payments are made for full time staff, whether they have taken partial retirement or not. Non pensionable elements should be used, as referenced above, please refer to the ESR PAD Manual for further details.

For information, an example of some of the elements that are available in the ESR Pad Manual are as follows:

Element Name	Processing Type	GRR	Salary Group	Pay Element	Niable	Taxable	Pensionable
Additional Duty NR NP NHS	Non-Recurring	Yes	8	Additional Duty NR NP PAY NHS	Yes	Yes	No
Additional Rostered Hrs NP NHS	Recurring	Yes	X	Additional Rostered Hrs NP PAY NHS	Yes	Yes	No
Additional Rostered Hrs NP PAY NHS	Non-Recurring	No	X	Additional Rostered Hrs NP PAY NHS	Yes	Yes	No
Additional Rostered Hrs NR NP NHS	Non-Recurring	Yes	X	Additional Rostered Hrs NP PAY NHS	Yes	Yes	No
Additional Rostered Hrs NR NP NHS	Non-Recurring	Yes	X	Additional Rostered Hrs NR NP PAY NHS	Yes	Yes	No
Additional Rostered Hrs NR NP PAY NHS	Non-Recurring	No	X	Additional Rostered Hrs NR NP PAY NHS	Yes	Yes	No
Average Overtime NR NP NHS	Non-Recurring	Yes	0	Average Overtime PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Bank Holiday OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Night Duty OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Plain Time OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Rest Day OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Saturday OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Sunday OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Unsocial OT PAY NHS	Yes	Yes	No
Overtime Contracted NHS	Recurring	No	0	Weekday OT PAY NHS	Yes	Yes	No
Overtime Multipliers NHS	Recurring	Yes	0		No	No	No
Overtime NR NP NHS	Non-Recurring	No	0	Bank Holiday OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Night Duty OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Plain Time OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Rest Day OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Saturday OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Sunday OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Unsocial OT PAY NHS	Yes	Yes	No
Overtime NR NP NHS	Non-Recurring	No	0	Weekday OT PAY NHS	Yes	Yes	No
Reg Additional Sessions NP NHS	Recurring	Yes	4	Reg Additional Sessions NP NHS	Yes	Yes	No

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*Q. How do I pay pensionable overtime once the employee has reached the end of the 12 months initial period?*

A. The same elements that are currently used for part time employees who have not taken partial retirement and are working additional overtime can be used. For example, the pensionable Basic NR NHS element could be used in this scenario.

*Q. How do I manage the rosters for non-pensionable overtime?*

A. Any elements you wish to use for the payment of overtime will need to be made available in the rostering system for managers to select. These will then feed into ESR via the NHS Generic Absence and Attendance Inbound Interfaces.

As Rostering systems are managed by third party software providers and are independent of ESR, you will need to speak to your Rostering supplier for guidance in this area.

## **ACTION REQUIRED**

The above guidance should be reviewed and applied as required.

## **FURTHER INFORMATION**

None

## **NEXT UPDATE**

None