ELECTRONIC STAFF RECORD

RN439A Guide to Enhancements and Changes Release 46.0.0.0 and 46.1.0.0

Information classification: PUBLIC

Revision Date: JUNE 2020

<u>Contents</u>

1   <u>Introduction</u>

The purpose of this document is to provide details of the enhancements to the ESR system in Release 46.0.0.0 and 46.1.0.0. The details are grouped in functionality order.

The changes to functionality outlined in this Release Notice are subject to successful testing. As is normal practice, any amendments to the content of the Release will be communicated in the Final Guide to Enhancement Notice.

Please note all Employee data used in this publication is fictional. Any similarity with the names used in this publication with the names of actual persons is purely coincidental and not intentional.

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2   <u>Temporary Removal of NMC and HCPC Registration Number Validation – Covid-19</u>

To accommodate the recording of registration numbers for temporary registrants that are being employed to meet the emergency workforce requirement due to COVID-19 the validation that is applied to the Registration Number fields for the Registration Bodies NMC and HCPC has been temporarily removed.

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3   <u>Updates to New Starter and Termination Notifications</u>

The New Starter Notification has been updated to include 2 new columns for Supervisor Name and Supervisor Email Address.

The new columns are appended at the end of the existing columns as follows:

The Termination Notification has been updated to include 3 new columns for Work Email Address, Supervisor Name and Supervisor Email Address.

The new columns are appended at the end of the existing columns as follows:

NOTE: All three new emails addresses being introduced will be displayed as hyperlinks that can be clicked on to create a new email to the address selected.

The email will automatically open in the default mail program defined in your browser. This setting may have to be changed for this functionality to work as expected.

4   <u>New Supplementary Role</u>

A new Supplementary Role called 'Digital Passport Administrator' is available in ESR.

Navigation Path:

XXX HR Administration

People > Enter & Maintain > Others > Supplementary Role
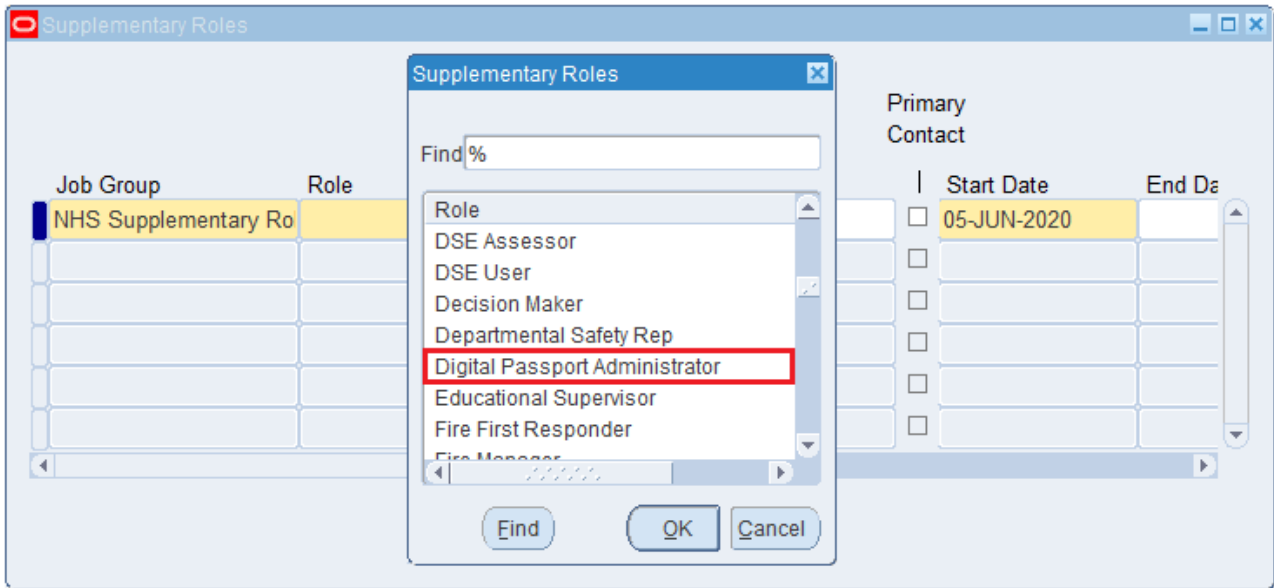
This is also available for reporting in ESR BI.

5   Changes to Shared Parental Leave

The existing Shared Parental Leave Functionality has been extended to allow for Occupational Pay to be automatically generated. This will work in a similar manner to OMP and OSP.

A National Occupational Shared Parental Pay (OSHP) Scheme has been created as follows:

Navigation Path:

XXX Absence Administration

View NHS OSHP Schemes

or

XXX Payroll Super Administration

Fastpath > NHS OSHP Schemes

NOTE: Local Schemes can also be setup depending on local requirements.

When Shared Parental Leave has been recorded click the OSHP button to view the OSHP form:

Shared Parental Pay Birth(Birth, Mr.)

Due Date	26-APR-2020	Birth Date	
Qualifying Week	12-JAN-2020	Return Date	

Maternity Leave Start Date	19-APR-2020	SMP/SMA Start Date	19-APR-2020
Maternity Leave End Date	02-MAY-2020	SMP/SMA End Date	02-MAY-2020
Maternity Leave Weeks Taken	2	SMP/SMA Weeks already Paid	2
Notice Date for Curtailment	02-MAY-2020	MPP/MAP Curtailment Date	02-MAY-2020

ShPL&P Details | Notice and Revoke | Partner Details

SPL Start Date	03-MAY-2020	SPL End Date	
SPL Weeks Taken Previously	0	ShPP Weeks Taken Previously	0
SPL Weeks Available	50	ShPP Weeks Available	37
Mother SPL Weeks Selected	24	Mother ShPP Weeks Selected	13
Partner SPL Weeks Selected	24	Partner ShPP Weeks Selected	24
		Split Days	....

Evidence | Statutory Payments | Absence | Notice | OSHP

NOTE: the correct leave to be paid must be entered into the associated Notice form as follows:

Shared Parental Birth Notice (Birth, Mr.)

Parent Employed	Partner	Date Notice Given	01-JAN-2020
SPL Start Date	03-MAY-2020	SPL End Date	17-APR-2021
Date of Rejection of Notice			

Mother SPL Start Date	Mother SPL End Date	Partner SPL Start Date	Partner SPL End Date
03-MAY-2020	17-OCT-2020	03-MAY-2020	17-OCT-2020

Absence   Others...

Summary

Where the employee qualifies then the corresponding days will generate Occupational Pay according to the rules. This can be reviewed on the OSHP form.

This OSHP form will always default to the national scheme. Where a different local scheme is to be used the correct scheme should be selected from the Scheme LoV and the record saved to see the new allocation.

The OSHP allocation is then used to create the OSHP payment elements for the person as shown in the OSHP Entries section above. This has created the payment elements in the corresponding pay periods.

Note - where the corresponding pay period for an OSHP element has already been processed, then the element for that period will be created in the next unprocessed period.

In the example above the OSHP Payment Elements where created as follows

Pay Period	OSHP Elements For	Full	Half	Nil
02 2020 Calendar Month	May	29	0	0
03 2020 Calendar Month	Jun	13	17	0
04 2020 Calendar Month	Jul	0	31	0
05 2020 Calendar Month	Aug	0	31	0
06 2020 Calendar Month	Sep	0	30	0
07 2020 Calendar Month	Oct	0	17	0

Example Calculation:

The entitlement that is displayed on the OSHP form is the available entitlement i.e. the entitlement from the scheme minus any Maternity/ Adoption leave already used over the 2 weeks minimum.

For example if 6 weeks maternity had already been taken the available entitlement is as follows:

42 days from the scheme – 28 days maternity used (4 weeks above the 2 week minimum) = 14 days remaining

NOTE: You can use the Others button at the bottom of the page to navigate back to Shared Parental Pay form.

The second example shows a scenario where the OSHP is to split between both partners (as both partners work for the NHS):

In this example the leave for both partners must be entered into the notice:

On navigating to the OSHP Form the full allocation will go to the employee by default.

Where the other partner is also an NHS employee the allocation of OSHP days should be split between both partners.

Where this is the case the 'Partner in NHS' flag should be ticked and the record saved:

Due to the order of the Leave the partner has now been allocated 56 of the Half Days from the available entitlement.

The employee values on the OSHP elements have also been updated accordingly.

But this default allocation can be overridden, say where the couple have decided to give the other partner the Full allocation.

The user can update the partner days as required and saved e.g. to allocate the full days to the other partner.

On saving the employee OSHP NHS elements will get updated accordingly.

Late Updates to the Absence Dates

Please note that where the user goes back and updates the leave dates in the notice and updates the related absences with the corresponding changes, then this can affect the original OSHP elements. In this scenario the user should always navigate back to the OSHP Form and click on the Recalculate button to ensure that the OSHP elements have been updated as required. On saving these changes the OSHP payment elements will be recalculated according to the new absence dates.

This means that for periods not yet processed the OSHP elements will be deleted and recreated. For periods that have already been processed new OSHP Correction elements will be created in the next unpaid

period to make any necessary adjustments.

This also applies to scenarios where additional periods of leave are entered into the notice and corresponding absences created after the original OSHP element creation.

6 HMRC Advisory Fuel Rates 01-JUN-2020

HMRC Advisory Fuel rates 01 June 2020

HMRC has published new advisory fuel rates for company cars effective 01-Jun-2020 and these rates are now in use in ESR.

For one month from the date of change, employers may use either the previous or new current rates, as they choose. Employers may therefore make or require supplementary payments if they so wish but are under no obligation to do either.

The revised rates are as follows:

Engine Size	Petrol	LPG
1400cc or less	10p	6p
1401cc to 2000cc	12p	8p
Over 2000cc	17p	11p

Engine Size	Diesel
1600cc or less	8p
1601cc to 2000cc	9p
Over 2000cc	12p

Engine Size	Electric
All	*4p

* No change has been made to these rates. These are stated for information only.

Action

Please note that mileage payments are not processed when NHS Retro Pay is run, so any changes to amounts already paid will need to be made manually.

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7   **Employers Rate Change for South Yorkshire LGPS**

The Employer rates for South Yorkshire LGPS have been changed from 01-APR-2020 to 21.4%.

The National GRR rules have been updated from 13.5 to 21.4%

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8   Pensions Override Date - IAT

The IAT Process has been enhanced so that if the 'Override Pension End Date' field on the 'Pension NHS' element of an employee's Primary assignment has been populated then this value will be transferred into the 'Override Pension Start Date' field of the 'Pension NHS' element of the Primary assignment at the Target VPD + 1 day. For example:

Source Trust:

Override Pension End Date = 05-May-2020

Target Trust (after IAT)

Override Pension Start Date = 06-May-2020

Three new fields have been added to the 'Add'l Element Entry Info.' DFF to record this information:

- IAT Update
- IAT Update Date
- IAT Source VPD

Where the 'Override Pension Date' is transferred this will also be logged against the 'Pension NHS' element DFF, updating the field 'IAT Update' to 'YES'. The system date of the update will be recorded in the field 'IAT Update Date'. The VPD for the Source Trust, i.e. where the IAT originated from will be recorded in the 'IAT Source VPD' field.

If the 'Override Pension Start Date' field on the 'Pension NHS' element is updated manually after a previous IAT had been performed then the 'IAT Update' field will be updated from 'YES' to 'NO' but any data present

from the previous IAT will remain i.e. the 'IAT Update Date' and 'IAT Source VPD' fields. This can be used for information but users can manually remove this data if they wish.

If the 'Override Pension Start Date' field on the 'Pension NHS' element is updated manually where no previous IAT has taken place then no update will be made to the 'IAT Update' field and it will remain blank.

When transferred via IAT the 'Override Pension Start Date' will be applied to the current date track row and any future rows for the same entry, if the 'Override Pension Start Date' is currently null.

If there is an existing value in the 'Override Pension Start Date' field (whether populated manually or by a previous IAT) and a subsequent PDS Copy is performed, then no update will be made to the existing values.

Reporting

The three new DFF fields are available to report on in ESRBI via the Human Resources - Element Entry Subject Area.

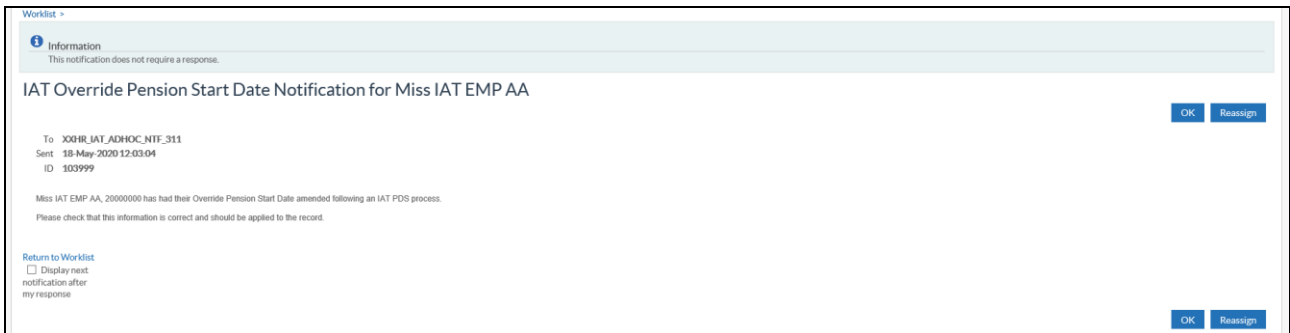Notifications

A notification will be produced where a non-null 'Override Pension Start Date' is transferred as above. The notification is titled:

'IAT Override Pension Start Date Notification for <Title> <First Name> <Last Name>'

The notification will be sent to users in the 'PDS Notification' role or any locally customised 'PDS Notification' roles if any have been created.

Example Notification:

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9   <u>Payslip and P60 View Reporting</u>

The following new forms have been added to View Events in the Audit View Event Subject Area:

- On-Line P60 – Portal
- On-Line P60
- On-Line Payslip
- On-Line Payslip – Portal

These allow organisations to report on when an employee has viewed their payslip or P60 via ESR Self Service. Users can navigate to the View Events tab of the NHS Change Event Log Dashboard to see these additional events.

PLEASE NOTE: these events will only be recorded from the time of this release onwards. Historical data is not available.

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10   <u>Work Mobile – Learning Subject Area</u>

The 'Work Mobile' Phone Type is now available within ESRBI in the Human Resources – Learning Enrollment and Completion Subject Area.

Navigation:

XXX HR Administration

People > Enter & Maintain > Address > Phones > Type: Work Mobile

This is available in the Delegate Attributes folder and is titled 'Work Mobile Phone Number' in line with the existing Mobile Phone Number.

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11   Subjective Code Description – Position Analysis Subject Area

The Subjective Code Description is now available within ESRBI in the Position Analysis Subject Area.