ELECTRONIC STAFF RECORD

RN449 Guide to Enhancements and Changes Release 47.0.0.0 and 47 1 0 0

Information classification: PUBLIC

Revision Date: SEPTEMBER 2020

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<u>Contents</u>

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1   <u>Introduction</u>

The purpose of this document is to provide details of the enhancements to the ESR system in Release 47.0.0.0 and 47 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   ESR Portal – Applicant Dashboard Changes

The My Applicant Dashboard has been updated to include additional data items as well as a new tab layout.

When an Applicant accesses the Dashboard the 'My Applicant Details' portlet is now displayed as follows:
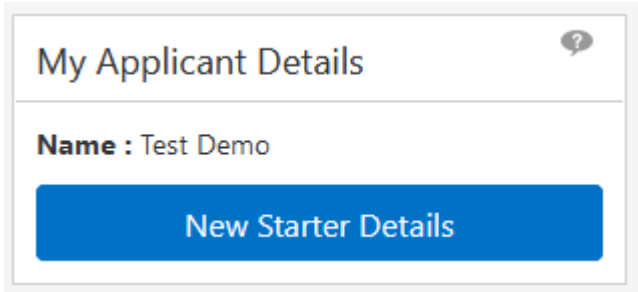
Clicking the 'New Starter Details' button will display the following tab layout:

- My Personal Information
- My Address
- My Emergency Contact
- My Qualifations
- My Registrations
- My Bank Account Details
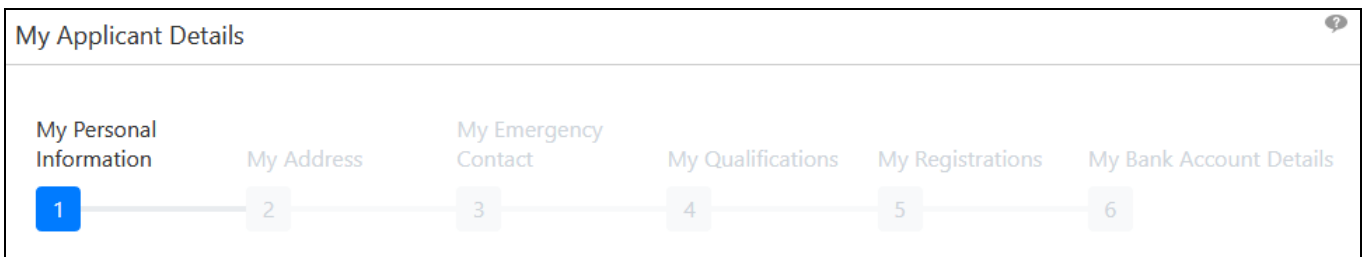
My Personal Information Tab

This allows the Applicant to review and edit the following data items:

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Please review your personal information. Select 'Edit' to update your details where required. Any updates will be sent to the HR/Recruitment Administrator to be progressed.

Edit ✏️

Title:	Mr.
First Name:	Test
Middle Name:	John
Surname:	Demo
Previous Surname:	
Preferred Name:	
NI Number:	JW060606D
Gender:	Male
Date of Birth:	01/06/1980
Nationality:	English
Work Email Address:	test@mail.co.uk
Working Time Directive Opt Out:	
Armed Forces Information:	

Next

Clicking 'Next' will take the user to the next tab in the sequence.

My Address Tab

This allows the Applicant to review and edit the following data items:

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Please review your address details. Select 'Edit' to update your details where required.

Edit ✎

Address: 1 New Street, Old Town, Warwick
                              Warwickshire
                              CV34 6NZ

Home Number: 01926 444444

Mobile Number: 07965 555555

Work Number: 01926 222222

Personal Email Address: myemail@test.co.uk

[Previous] [Next]

The Applicant can update any of the above details which will be applied directly to their person record. Clicking 'Next' will take the user to the next tab in the sequence.

My Emergency Contact Tab

This allows the Applicant to review and edit the following data items:

Please review your emergency contact details. Select 'Edit' to update your details where required.

Edit ✎

Name: Test Contact

*Relationship: Spouse

Home Number: 01926 444444

Work Number: 01926 555555

Mobile Number: 07964 111111

[Previous] [Next]

The Applicant can update any of the above details which will be applied directly to their person record. Clicking 'Next' will take the user to the next tab in the sequence.

My Qualifications Tab

This allows the Applicant to review the following data items:

These are your qualification details. Please contact your HR/Recruitment Administrator to make any changes to your details.

Title:	Business Studies
Start Date:	01/09/2001
End Date:	01/06/2005
Status:	Attained

Previous   Next

Clicking 'Next' will take the user to the next tab in the sequence.

My Registration Tab

This allows the Applicant to review the following data items:

These are your registrations details. Please contact your HR/Recruitment Administrator to make any changes to your details.

Registration/Membership Body:	CIPD
Professional Registration Number:	12345
Expiry Date:	01/01/2023
First Registered Date:	01/01/2019
Revalidation Date:	01/06/2021

Previous   Next

Clicking 'Next' will take the user to the next tab in the sequence.

My Bank Account Details Tab

These are the bank account details that were held for the Applicant in their previous employment and an IAT request has been submitted and approved – the behaviour is the same as detailed in RN411 – R44. The applicant can amend these as required:

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Please review your bank account details. Select 'Edit' to update your details where required.

Edit ✎

*Account Name: TEST

*Account Number: 15151515

*Sort Code: 56-00-59

Bank Name: 560059 NAT WEST BANK PLC

Branch: Newport, South Wales

Bld Society Number:

<center>[Previous]</center>

Select 'Confirm' if you are happy your Personal Information, Address, Emergency Contact and Bank Account Details are Correct.

<center>[Confirm]</center>

Selecting 'Previous' on any tab will take the user to the previous tab in the sequence.

Selecting 'Confirm' will produce the following pop-up:

New Starter Details

Are you sure you have reviewed and updated your new starter details where required and are happy to confirm they are correct?

[Yes, confirm details]   [NO, do not confirm details]

Clicking 'Yes, confirm details' will apply the Bank Account details and also update the 'Checked Personal Information' and 'Bank Details Confirmed' items in the Applicant Checklist to 'Completed':

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Once the data has been confirmed, this button will no longer be available to select. The applicant will still be able to review and edit the available data items within each tab until the point in which they are hired and will then have access to the My ESR Dashboard.

Notifications

If the Applicant edits their personal information this will be sent as an FYI notification to a new role holder called 'Applicant Details'. It is then the responsibility of the HR/Recruitment Administrator to enter the updated information into ESR.

An example of the notification is as follows:

The title format is as follows: <Last Name><Title><First Name><Middle Name>(Applicant Number)

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NOTE: If the data is not updated it will not be reflected on the Applicant Dashboard. If no user is in the 'Applicant Details' role the following message will be displayed:

'The updates to your personal information have not been sent, please contact your HR/Recruitment Administrator for more information.'

The following navigation path can be used to define user's in this new role:

XXX Local HRMS Systems and User Administration > Maintain Roles > Applicant Details

IAT Changes

As part of the development, the following data items will be included as part of the IAT pre-hire process:

Data Item	ESR Location	Method
Preferred Name	Person Form > Further Name	Correction
WTR Opt Out	Person Form > Additional Person Details	Correction
Personal Email Address	Addresses > Phones > Personal E-Mail type	Correction
Armed Forces Reservist	Person Form > Person Form > Others > Supplementary Role	System Date
Emergency Contacts*	Person Form > Contacts	System Date

*The Contact transferred will be the Emergency Contacts for the person. Where multiple emergency contacts exist for the user, the 'Primary Contact' (where the flag is selected) will be transferred. Where the flag for 'Primary Contact' is not selected, the most recent emergency contact (i.e. the latest from today's date) will be transferred.
The following fields and associated values will be transferred from the Contacts form:

- Last Name
- First Name
- Relationship
- Home Number (Contact's Details > Enter Phone Numbers)
- Work Number (Contact's Details > Enter Phone Numbers)
- Mobile (Contact's Details > Enter Phone Numbers)

This data will not be included in the PDS copy, any IAT related notifications or 6i reports.

Rules for transfer of data:

The target person for the IAT in the Target must be an Applicant, and must be one of the following Applicant statuses:

- Offer Accepted
- Offered Post Conditional
- Offered Post Unconditional

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3   Changes to Learning Dashboard Navigation

The following functions have been added to the navigation panel on the Learning Dashboard:

- Search and View Learner
- Enrolments and Subscriptions
- Content
- Learner Groups
- Reporting - Submit Request

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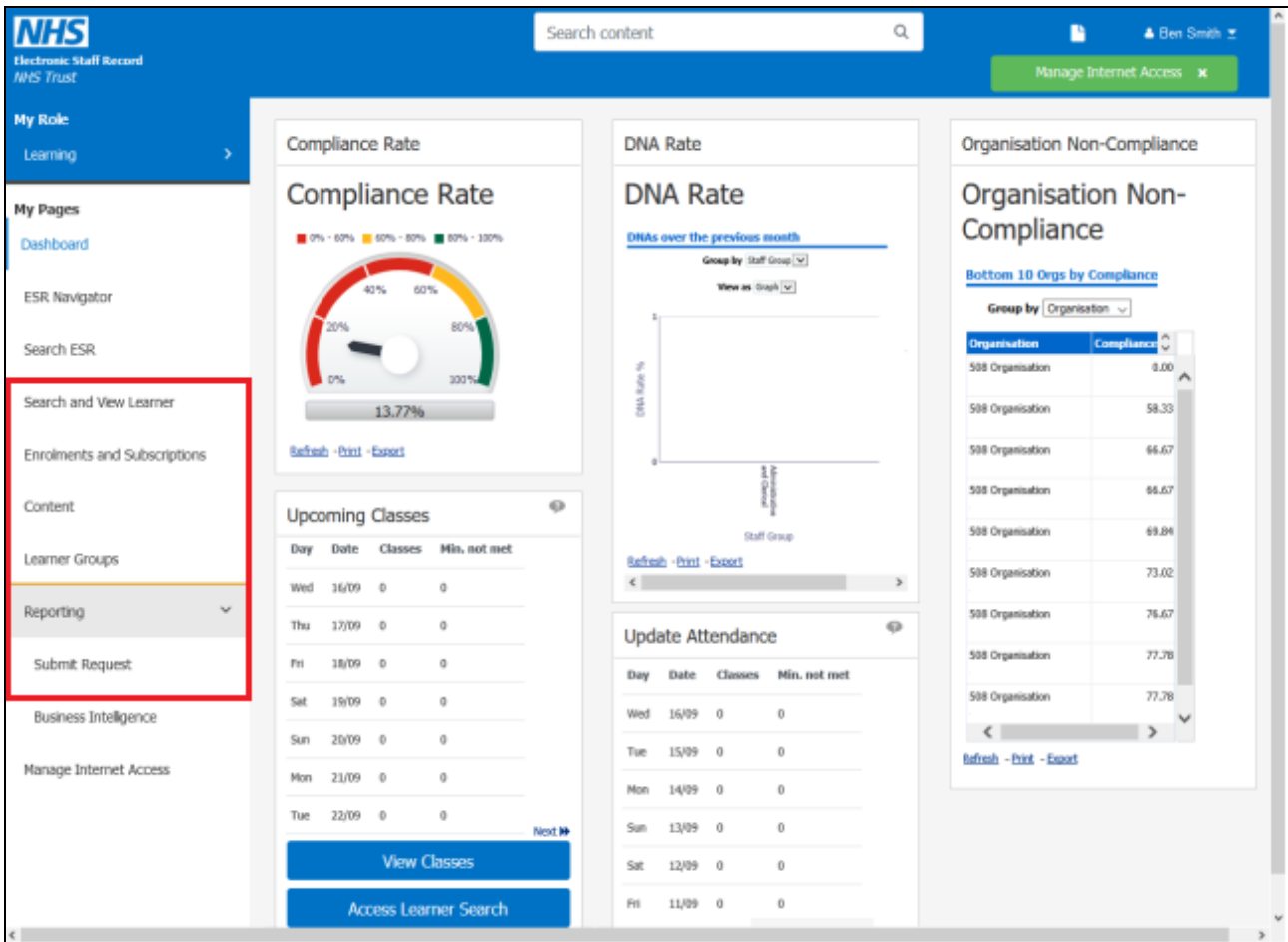
4   <u>Change to Default Value for Learner Type</u>

The default value for 'Learner Type' has been changed from 'Internal' to 'All' on the following OLM pages:

- Enrolments and Subscriptions
- Enrolments

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5   <u>ESR BI – Reporting on Shared Service Centres (SSCs)</u>

The Employee URP and Proxy Access folder within the Human Resources - Real Time Reporting subject area and the NHS User Administration Dashboard have been updated so that URPS allocated outside an organisation such as URPS allocated to Shared Service Centres can now be reported.

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6   <u>ESR BI – EU Status</u>

A new person EIT was introduced in Release 46.2 to capture EU Status data consisting of:

- EU Settlement Scheme Status
- Date EU Settlement Scheme Status Issued
- Expiry Date for EU Pre-settled Status
- EU Settlement Scheme Status Verified Date
- Granted EU Leave to Remain
- Leave to Remain Expiry Date
- E-Rec Vacancy Reference

This data is reportable in the EIT EU Status Folder within both the Human Resources - Person EIT Details and the Human Resources - Applicant EIT Details Subject Areas. Changes to this data will also be recorded in the Change Event Log.

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7   <u>Interfaces – EU Status</u>

A new EU Status record has been introduced to the Bi-directional Employment Checks Interface to process EU Status data both inbound and outbound.

EU Status data has been added to the inbound Applicant record of the e-Recruitment Interface.

EU Status data has been included in the GO2 interface output.

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8   <u>M&D Award 2020</u>

The element 'Clin Ex Award 2018 Scheme NR NP NHS' has been updated to include an additional input value of 'No of CEAs'.

The element now has one Allowance type - 'Local CEA' which holds one rate (current rate - 3092 GBP).

The system will use this rate and multiply that by the 'No of CEAs' entered and FTE to calculate the pay amount.
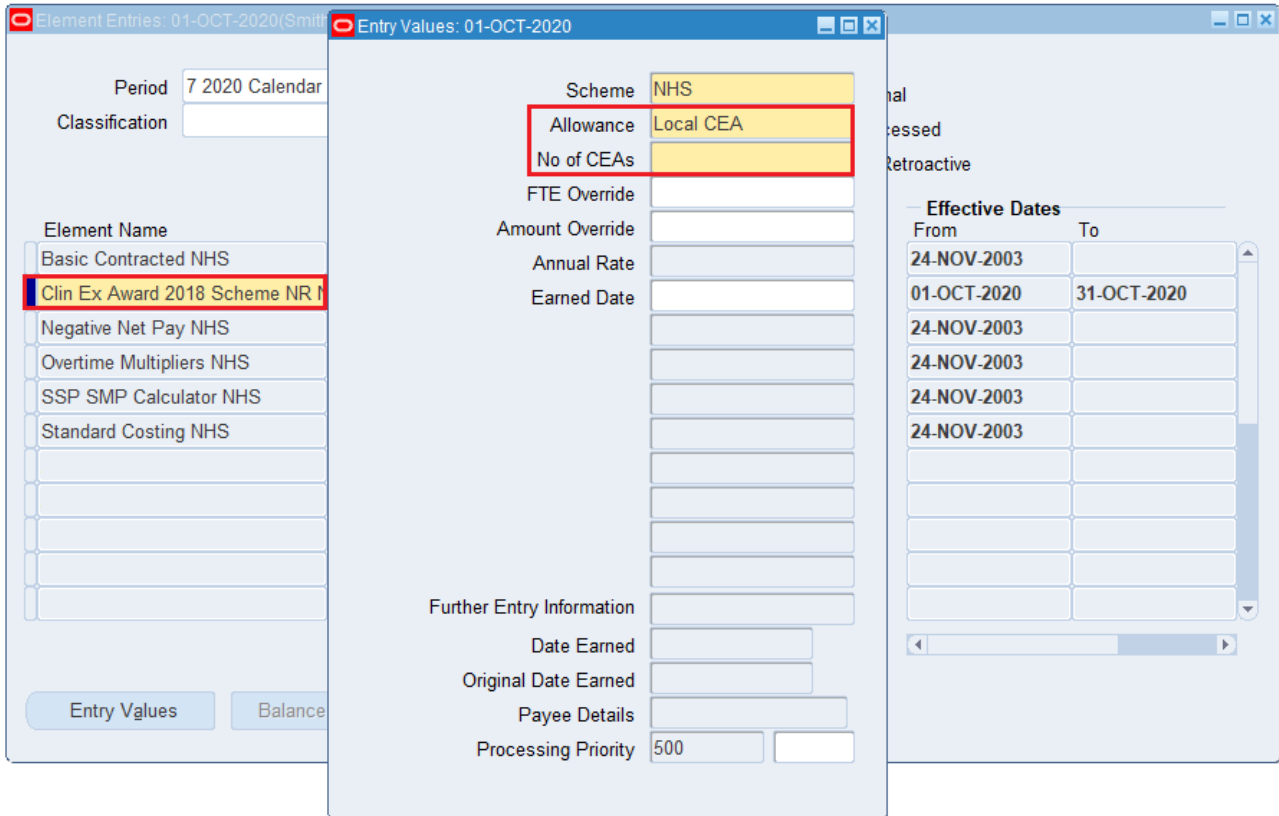
Where the assignment FTE has changed from the previous year an override feature is available.

In addition the amount processed can also be overridden as required.

9   Fuel Advisory Rates Sep 2020

HMRC has published new advisory fuel rates for company cars effective 01-Sep-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	7p
1401cc to 2000cc	*12p	*8p
Over 2000cc	*17p	12p

Engine Size	Diesel
1600cc or less	*8p
1601cc to 2000cc	10p
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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10   <u>Update Contribution Rates for GMB</u>

The following GMB rates have been updated with an effective date of the 01-Oct-2020:

Column Name	New Rate	Old Rate for Reference	From
Full Time Standard Weekly	**3.35**	3.25	01-Oct-20
Full Time Opt Out Weekly	**3.21**	3.11	01-Oct-20
Full Time Standard Monthly	**14.57**	14.14	01-Oct-20
Full Time Opt Out Monthly	**13.93**	13.50	01-Oct-20
Part Time Standard Weekly	**1.93**	1.88	01-Oct-20
Part Time Opt Out Weekly	**1.85**	1.80	01-Oct-20
Part Time Standard Monthly	**8.40**	8.18	01-Oct-20
Part Time Opt Out Monthly	**8.04**	7.82	01-Oct-20
Promotional Weekly**	**1.00**	1.00	01-Oct-15
Promotional Monthly**	**4.34**	4.34	01-Oct-15
Full Time Opt In Weekly	**3.36**	3.26	01-Oct-20
Full Time Opt In Monthly	**14.61**	14.18	01-Oct-20
Part Time Opt In Weekly	**1.94**	1.89	01-Oct-20
Part Time Opt In Monthly	**8.44**	8.22	01-Oct-20
Promotional Opt In Weekly**	**1.01**	1.01	01-Mar-18
Promotional Opt In Monthly**	**4.39**	4.39	01-Mar-18
Apprentice Standard Weekly**	**0.69**	0.69	01-Oct-19
Apprentice Opt In Weekly**	**0.70**	0.70	01-Oct-19
Apprentice Standard Monthly**	**3.00**	3.00	01-Oct-19
Apprentice Opt In Monthly**	**3.05**	3.05	01-Oct-19

** No change to these rates.

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11   Change to Pensions 'Reason for Opt-Out' field

Where the 'Opt Out' field is set to 'Yes' on the Pension NHS element the 'Reason for Opt Out' field will become mandatory and a reason must be selected before the record can be saved.

Where the 'Opt Out' field is set to 'No' then the 'Reason for Opt Out' field will become inactive and any existing reason, if recorded, will be removed.

The Pensions Re-enrolment process will remove the 'Reason for Opt Out' field when its resets the 'Opt Out' field to 'No' as part of a re-enrolment into the NHS Pension scheme.

The interface to NHS Pensions has been updated to make sure that the selected 'Reason for Opt Out' field is included in the Leaver record which is sent to them when someone sets the 'Opt-Out' field to 'Yes'.

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