



ELECTRONIC STAFF RECORD

RN477 Guide to Enhancements and Changes Release 50.0.0.0 & 50.1.0.0

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Contents

1	Introduction	3
<u>SSHR</u>		
2	Supplementary Roles available in SSHR	4
3	Conflict of Interest – Updates to Notifications and Applicant Access	7
4	Search and Select Window Behaviour	9
<u>ESR</u>		
5	National Workforce Dataset - ESR Amendments	10
6	Doctor in Training Grade now included in IAT DBS data	14
<u>DATA WAREHOUSE</u>		
7	Data Warehouse Data Item Review.....	15
<u>PAY</u>		
8	Salary Sacrifice Reducing Balance Element	25
9	Added Years Calculation after Sickness.....	30
10	HMRC Advisory Fuel Rates	31

1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 50.0.0.0 & 50.1.0.0. 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.

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.

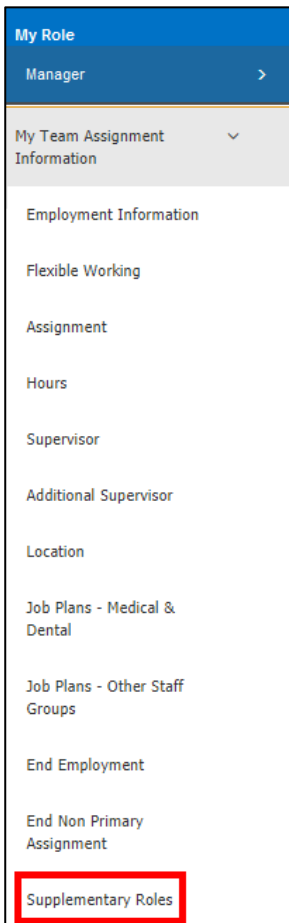
2 Supplementary Roles available in SSHR

The Supplementary Roles functionality is now available within the following URPs:

- Manager Self Service (Payroll Approvals Not Required)
- Manager Self Service (Payroll Approvals Required)
- Supervisor Self Service
- Supervisor Self Service (Limited Access)
- Administrator Self Service (Payroll Approvals Not Required)
- Administrator Self Service (Payroll Approvals Required)

Manager Self Service/Supervisor Self Service

The new function is available under the My Team Assignment Information sub menu.

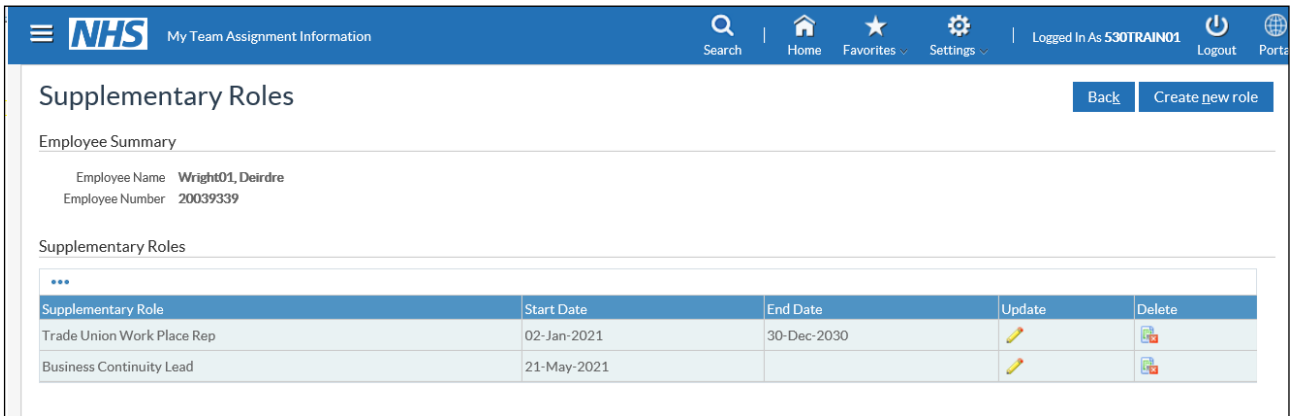


The page allows users to Add, Update, or Delete Supplementary Roles for their staff.

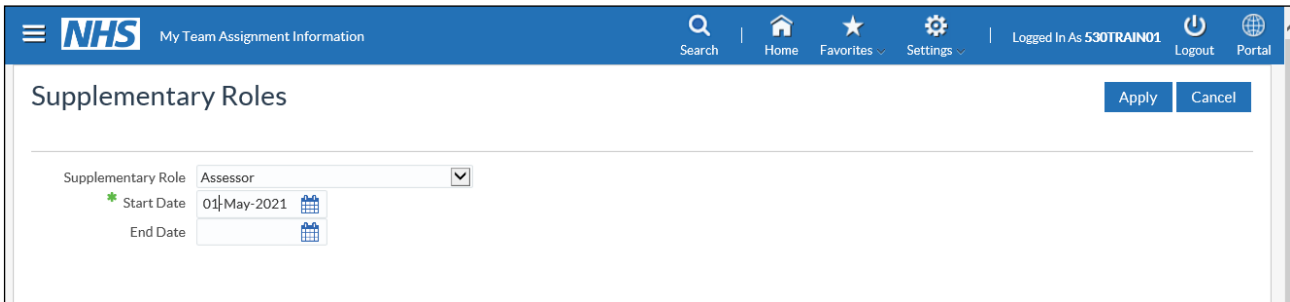
All Supplementary Roles will be available apart from the following which will be excluded for SSHR:

- CRS Registration Agent
- Digital Passport Administrator
- NHS CRS RA Agent
- NHS CRS Sponsor
- Local Smart Card Administrator

The landing page has buttons to update or delete existing rows, or to create new roles.



Click **Create new role** to enter details for a new role.



Click **Apply** to save the new row.

Administrator Self Service

In Administrator Self Service (both versions) changes will be applied directly to ESR and an FYI notification will be sent to the appropriate manager for review.

Employee Self Service

Employees will have read only access to Supplementary Roles held against their record using the following URPs.

- Employee Self Service
- Employee Self Service (Limited Access)

The screenshot shows a vertical sidebar menu titled 'My Role' with a blue header. Below the header is 'My ESR'. Underneath is a section titled 'My Pages' containing 'Dashboard', 'My Appraisals and Reviews', and 'My Employment' (which has a dropdown arrow). Below 'My Employment' are several menu items: 'Employment Information', 'Flexible Working', 'Job Plans - Medical & Dental', 'Job Plans - Other Staff Groups', 'End Employment', and 'End Non Primary Assignment'. At the bottom of the menu, 'Supplementary Roles' is highlighted with a red rectangular box.

The screenshot shows the 'Supplementary Roles' page in the NHS system. The top navigation bar includes the NHS logo, Home, Favorites, Settings, and a user profile 'Logged In As 508BSMITH01' with Logout and Portal options. The page title is 'Supplementary Roles' with a 'Back' button. Below the title is an 'Employee Summary' section showing 'Employee Name: Smith, Ben' and 'Employee Number: 20066538'. The main section is titled 'Supplementary Roles' and contains a table with one role listed.

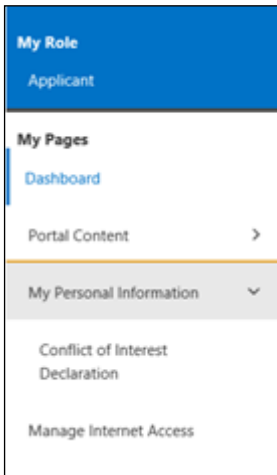
Supplementary Role	Start Date	End Date	Update	Delete
Fire Officer	01-Jun-2021			

3 Conflict of Interest – Updates to Notifications and Applicant Access

The following changes have been made to the Conflict of Interest functionality.

Applicant Conflict of Interest Declarations

A new function has been added to the Applicant dashboard menu to allow applicants to record Conflict of Interest Declarations.



This will open the same page that is available to employees to allow applicants to record their declarations.

Updates to the Conflict of Interest Reviewer Notification

The notification will include information where an employee has deleted a Conflict of Interest declaration that has previously been recorded and has a Manager Action recorded against it.

These will be shown in the notifications with a new change type of 'DELETE', see the example on the following page.

The layout of this notification has changed slightly to accommodate the changes made by applicants as well as employees.

There is a new column for Person Type to indicate if the change was for an Applicant or an Employee.

NOTE: Changes made by an Employee.Applicant will always be treated as employee changes.

Where the person type is 'Applicant' the assignment number column will display the applicant number.

Worklist >

i Information
This notification does not require a response.

Conflict of Interest Updates

[OK](#) [Reassign](#)

To **Mgr A**
Sent **26-May-2021 09:50:08**
ID **147622**

These are the changes to the Declarations made in the previous Month (01-May-2021 to 31-May-2021):
The number of 'Nothing to Declare' declarations made in this period is: 1

Change Type	Person Type	Name	Assignment Number	Position	Category	Situation	Start Date	End Date	Consent	Submission Date
DELETE	Employee	Emp A,	20065920	Pos A	Financial interests	Clinical private practice	01-MAY-2021		Y	21-MAY-2021
INSERT	Applicant	APL A,	2180	Pos A	Non-financial personal interests	Loyalty interests	21-MAY-2021		Y	21-MAY-2021
INSERT	Applicant	APL A,	2180	Pos A	Financial interests	Gifts	12-MAY-2021		Y	12-MAY-2021

If further details of declarations are required, these can be found using the relevant reporting areas in BI.

[Return to Worklist](#)
 Display next notification after my response

[OK](#) [Reassign](#)

New Manager Notification

Managers will now receive a copy of the monthly Conflict of Interest notification (as above) but in the case of a manager this notification will only contain the assignments that report to them. It will also include any applicants where there is an active application assigned to this manager.

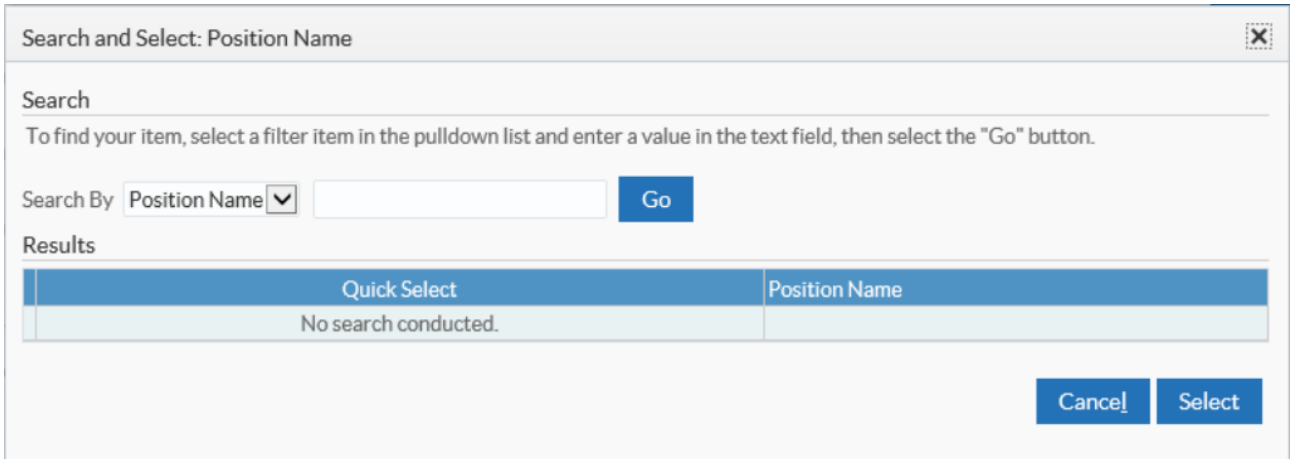
Applications will be considered to be active where they are at one of the following statuses:

- Offer Accepted
- Offered Post Unconditional
- Offered Post Condition

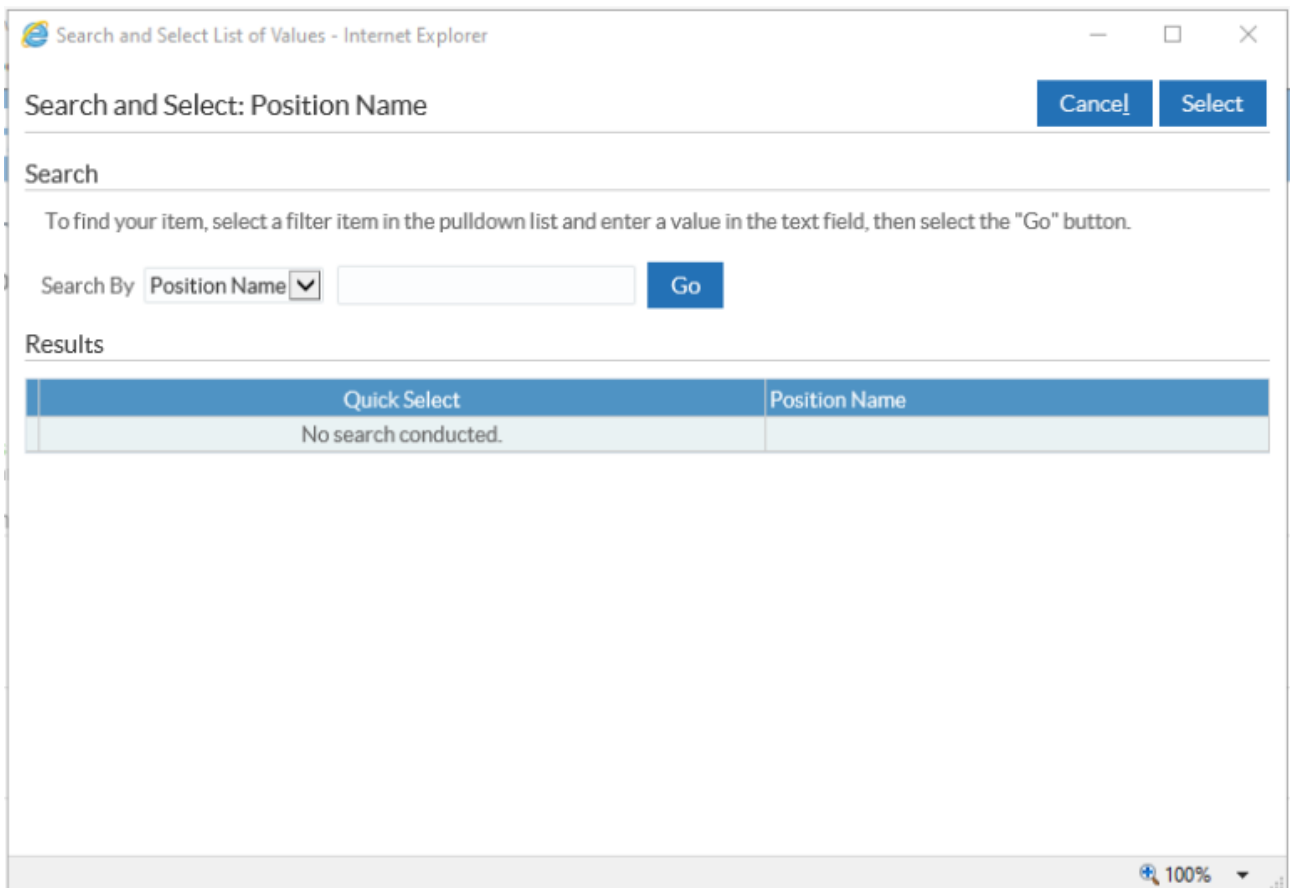
The manager notification will only be sent where there is at least one assignment or application record with changes for the manager that month.

4 Search and Select Window Behaviour

The behaviour of the Search and Select window has changed. Prior to R50 it displayed as a pop-up on the same page:



From R50.0.0 it now displays in a seperate window:



This is how the functionality behaved prior to R48.0.0 and affects all Search and Selects across relevant SSHR and OLM pages. This has been raised with our third party provider and can be tracked on the KEL via PRB2002005.

5 National Workforce Dataset - ESR Amendments

The National Workforce Data set which is maintained by NHS Digital has been updated and version 3.2 was approved and published by the Data Alliance Partnership Board. The following changes to values within ESR have been made and are outlined below.

1. Staff Group / Job Role

The following 13 Staff Group / Job Roles have been created:

Main Staff Group	Job Role	Date From	Date To
Administrative and Clerical	Library and Knowledge Services Professional	01-JAN-1951	
Administrative and Clerical	Library and Knowledge Services Paraprofessional	01-JAN-1951	
Allied Health Professionals	Operating Department Practitioner Manager	01-JAN-1951	
Allied Health Professionals	Operating Department Practitioner Specialist Practitioner	01-JAN-1951	
Additional Professional, Scientific and Technical	Anaesthesia Associate	01-JAN-1951	
Nursing and Midwifery Registered	Surgical Care Practitioner	01-JAN-1951	
Additional Clinical Services	Maternity Support Worker	01-JAN-1951	
Students	Student Operating Department Practitioner	01-JAN-1951	
Allied Health Professionals	Osteopath Manager	01-JAN-1951	
Allied Health Professionals	Osteopath Specialist Practitioner	01-JAN-1951	
Students	Student Osteopath	01-JAN-1951	
Additional Clinical Services	Health and Wellbeing Coach	01-JAN-1951	
Additional Clinical Services	Care Coordinator	01-JAN-1951	

The following Staff Group / Job Role has been end dated:

Main Staff Group	Job Role	Date From	Date To
Administrative and Clerical	Librarian	01-JAN-1951	30-JUN-2021

The following 4 Staff Group / Job Roles have been renamed:

Main Staff Group	Old Job Role	New Job Role	Date From	Date To
Allied Health Professionals	Drama Therapist	Dramatherapist	01-JAN-1951	
Allied Health Professionals	Drama Therapist Consultant	Dramatherapist Consultant	01-JAN-1951	
Allied Health Professionals	Drama Therapist Manager	Dramatherapist Manager	01-JAN-1951	
Allied Health Professionals	Drama Therapist Specialist Practitioner	Dramatherapist Specialist Practitioner	01-JAN-1951	

The following 3 Job Roles have changed Main Staff Group:

Current Staff Group	Current Job Role	New Staff Group
Add Prof Scientific and Technic	Surgical Care Practitioner	Allied Health Professionals
Add Prof Scientific and Technic	Operating Department Practitioner	Allied Health Professionals
Add Prof Scientific and Technic	Osteopath	Allied Health Professionals

Existing Positions and Assignments with the 'old' values have been updated with the new/renamed values.

2. Area of Work

The following 2 Area of Work values have been created:

Area of Work (Pri/Sec/Ter)	Date From
General Acute Accident and Emergency Accident and Emergency Streaming	01-JAN-1951
Primary Care Urgent Treatment Centre Urgent Treatment Centre	01-JAN-1951

The following 6 Area of Work values have been updated:

Old Value (Pri/Sec/Ter)	New Value (Pri/Sec/Ter)
Mental Health Mental Health Primary Care Community Mental Health	Mental Health Mental Health Primary Care Mental Health – Community
Corporate Informatics Knowledge Management	Corporate Informatics Library and Knowledge Management
Clinical Support Art/Music/Drama Therapy Art/Music/Drama Therapy	Clinical Support Art/Music/Dramatherapy Art/Music/ Dramatherapy
Clinical Support Art/Music/Drama Therapy Art Therapy	Clinical Support Art/Music/Dramatherapy Art Therapy

Clinical Support Art/Music/Drama Therapy Drama Therapy	Clinical Support Art/Music/Dramatherapy Dramatherapy
Clinical Support Art/Music/Drama Therapy Music Therapy	Clinical Support Art/Music/Dramatherapy Music Therapy

The areas highlighted in bold text in the table above are the new changed values.

Existing Positions with the 'old' tertiary values have been updated with the new/renamed values where possible. However, as part of the testing process, a small number of positions have been identified that have existing errors preventing the data fix being successful. These positions will retain the old value until they are manually resolved by users and will be flagged to organisations using the "Area of Work is no longer valid or is blank" validation within the ESR BI Data Quality Dashboard.

Click on the following link for further guidance on how to resolve these issues:

https://my.esr.nhs.uk/dashboard/web/esrweb/notification-download/-/document_library/k4JKcjh8rl2X/view_file/934930486

The following Area of Work value has been end dated as of 30-JUN-2021:

Area of Work	End Date
Medicine General Medicine Acute Medicine	30-JUN-2021

3. Occupation Codes

The following 6 Occupation Codes have been created:

Occ Code	Occupation Code Description	Category	Date From	Date To
S9L	Assistant in Applied Psychology	Gen	01-JAN-1951	
S0V	Manager in Osteopathy	Gen	01-JAN-1951	
S1V	Therapist in Osteopathy	Gen	01-JAN-1951	
S5V	Assistant Practitioner in Osteopathy	Gen	01-JAN-1951	
S8V	Student / Trainee in Osteopathy	Gen	01-JAN-1951	
S9V	Assistant in Osteopathy	Gen	01-JAN-1951	

The following 8 Occupation Codes have been renamed:

Occ Code	Old Occupation Code Description	Occupation Code Description	Date From
SAH	Consultant Therapist / Scientist in Art / Music / Drama Therapy	Consultant Therapist / Scientist in Art / Music / Dramatherapy	01-JAN-1951
S0H	Manager in Art / Music / Drama Therapy	Manager in Art / Music / Dramatherapy	01-JAN-1951
S1H	Therapist in Art / Music / Drama Therapy	Therapist in Art / Music / Dramatherapy	01-JAN-1951
S6H	Instructor / Teacher in Art / Music / Drama Therapy	Instructor / Teacher in Art / Music / Dramatherapy	01-JAN-1951
S5H	Assistant Practitioner in Art / Music / Drama Therapy	Assistant Practitioner in Art / Music / Dramatherapy	01-JAN-1951
S8H	Student / Trainee in Art / Music / Drama Therapy	Student / Trainee in Art / Music / Dramatherapy	01-JAN-1951
S9H	Assistant in Art / Music / Drama Therapy	Assistant in Art / Music / Dramatherapy	01-JAN-1951
S1T	Therapist Operating Theatres (Closed)	Therapist in Operating Theatres	01-JAN-1951

Existing Positions with the 'old' Occupation Code description have been updated with the renamed Occupation Code description.

NOTE: In addition to being renamed Occupation Code S1T has also had the end date removed.

4. Nationality

The following Nationality has been renamed:

Old Nationality	New Nationality	Date From	Date To
Swazi	Liswati	01-JAN-1951	

Employees with the 'Old' value will have them replaced with the renamed value.

Reporting

The above changes have also been reflected in ESR BI and the DW.

6 Doctor in Training Grade now included in IAT DBS data

The payscale MT05 has now been included as one of the Doctor in Training grades and so the IAT PDS for this grade will now include DBS data.

The IAT process has also been aligned with the Junior Doctor and Trainee Dentist Pre-Employment Notification. This means that some Trainee Dentist grades will now also be treated in the same way and will include the DBS data as part of the IAT.

7 Data Warehouse Data Item Review

Following a review of all data items within the Data Warehouse, a number of items have been identified for removal or renaming, and others for a change of dimension folder, as approved by the Data Warehouse Reference Group.

The following 172 data items have been removed:

Business Area Name	Folder Name	Data Item Name
Absence Rate Subject Area	Abs Rate Assignment Dim	Census Nature Of Contract
Absence Rate Subject Area	Abs Rate Occupation Code Dim	Second Specialty Code
Absence Rate Subject Area	Abs Rate Occupation Code Dim	Second Specialty Desc
Absence Rate Subject Area	Abs Rate Org Dim	Effective End Date
Absence Rate Subject Area	Abs Rate Org Dim	Effective Start Date
Absence Rate Subject Area	Abs Rate Org Dim	Name
Absence Rate Subject Area	Abs Rate Org Dim	Old Region Code
Absence Rate Subject Area	Abs Rate Org Dim	Old Region Name
Absence Subject Area	Abs Assignment Dim	Asg Census Nature Of Contract
Absence Subject Area	Abs Org Dim	Area Team Code
Absence Subject Area	Abs Org Dim	Area Team Name
Absence Subject Area	Abs Org Dim	Effective End Date
Absence Subject Area	Abs Org Dim	Effective Start Date
Absence Subject Area	Abs Org Dim	Name
Absence Subject Area	Abs Org Dim	Old Region Code
Absence Subject Area	Abs Org Dim	Old Region Name
Absence Subject Area	Abs position Dim	Pos Second Specialty Code
Absence Subject Area	Abs position Dim	Pos Second Specialty Desc
Absence Subject Area	Abs position Dim	Suitable For Int Recruit
Demonstrated Skills Subject Area	Demo Assignment Dim	Asg Census Nature Of Contract
Demonstrated Skills Subject Area	Demo Occupation Code Dim	Second Specialty Code
Demonstrated Skills Subject Area	Demo Occupation Code Dim	Second Specialty Desc
Demonstrated Skills Subject Area	Demo Org Dim	Area Team Code
Demonstrated Skills Subject Area	Demo Org Dim	Area Team Name
Demonstrated Skills Subject Area	Demo Org Dim	Effective End Date
Demonstrated Skills Subject Area	Demo Org Dim	Effective Start Date

Demonstrated Skills Subject Area	Demo Org Dim	Name
Demonstrated Skills Subject Area	Demo Org Dim	Old Region Code
Demonstrated Skills Subject Area	Demo Org Dim	Old Region Name
Demonstrated Skills Subject Area	Demo Position Dim	Pos Second Specialty Code
Demonstrated Skills Subject Area	Demo Position Dim	Pos Second Specialty Desc
Demonstrated Skills Subject Area	Demo Position Dim	Suitable For Int Recruit
Learning Subject Area	Learning Assignment Dim	Census Nature Of Contract
Learning Subject Area	Learning Enrolment Status Dim	Person Sec Cats
Learning Subject Area	Learning Occupation Code Dim	Second Specialty Code
Learning Subject Area	Learning Occupation Code Dim	Second Specialty Desc
Learning Subject Area	Learning Occupation Code Dim	Security Category Id
Learning Subject Area	Learning Occupation Code Dim	Sgp Id
Learning Subject Area	Learning Occupation Code Dim	Suitable For Int Recruit
Learning Subject Area	Learning Org Dim	Area Team Code
Learning Subject Area	Learning Org Dim	Area Team Name
Learning Subject Area	Learning Org Dim	Effective End Date
Learning Subject Area	Learning Org Dim	Effective Start Date
Learning Subject Area	Learning Org Dim	Name
Learning Subject Area	Learning Org Dim	Old Region Code
Learning Subject Area	Learning Org Dim	Old Region Name
Learning Subject Area	Learning Org Dim	Org Flag
Payroll Subject Area	Payroll Assignment Dim	Asg Census Nature Of Contract
Payroll Subject Area	Payroll Occupation code dim	Second Specialty Code
Payroll Subject Area	Payroll Occupation code dim	Second Specialty Desc
Payroll Subject Area	Payroll Org Dim	Area Team Code
Payroll Subject Area	Payroll Org Dim	Area Team Name
Payroll Subject Area	Payroll Org Dim	Effective End Date
Payroll Subject Area	Payroll Org Dim	Effective Start Date
Payroll Subject Area	Payroll Org Dim	Name
Payroll Subject Area	Payroll Org Dim	Old Region Code
Payroll Subject Area	Payroll Org Dim	Old Region Name
Position Composition Subject Area	Pos Comp Occupation Code Dim	Second Specialty Code
Position Composition Subject	Pos Comp Occupation Code Dim	Second Specialty Desc

Area		
Position Composition Subject Area	Pos Comp Organisation Dim	Area Team Code
Position Composition Subject Area	Pos Comp Organisation Dim	Area Team Name
Position Composition Subject Area	Pos Comp Organisation Dim	Effective End Date
Position Composition Subject Area	Pos Comp Organisation Dim	Effective Start Date
Position Composition Subject Area	Pos Comp Organisation Dim	Name
Position Composition Subject Area	Pos Comp Organisation Dim	Old Region Code
Position Composition Subject Area	Pos Comp Organisation Dim	Old Region Name
Position Composition Subject Area	Pos Comp Position Dim	Pos Second Specialty Code
Position Composition Subject Area	Pos Comp Position Dim	Pos Second Specialty Desc
Position Composition Subject Area	Pos Comp Position Dim	Suitable For Int Recruit
Position Requirements Subject Area	Pos Assignment Dim	Asg Census Nature Of Contract
Position Requirements Subject Area	Pos Occupation Code Dim	Second Specialty Code
Position Requirements Subject Area	Pos Occupation Code Dim	Second Specialty Desc
Position Requirements Subject Area	Pos Org Dim	Area Team Code
Position Requirements Subject Area	Pos Org Dim	Area Team Name
Position Requirements Subject Area	Pos Org Dim	Effective End Date
Position Requirements Subject Area	Pos Org Dim	Effective Start Date
Position Requirements Subject Area	Pos Org Dim	Name
Position Requirements Subject Area	Pos Org Dim	Old Region Code
Position Requirements Subject Area	Pos Org Dim	Old Region Name
Position Requirements Subject Area	Pos Position Dim	Pos Second Specialty Code

Position Requirements Subject Area	Pos Position Dim	Pos Second Specialty Desc
Position Requirements Subject Area	Pos Position Dim	Pos Suitable For Int Recruit
Training and Attendance Subject Area	Training Assignment Dim	Asg Census Nature Of Contract
Training and Attendance Subject Area	Training Occupation Code Dim	Effective End Date
Training and Attendance Subject Area	Training Occupation Code Dim	Second Specialty Code
Training and Attendance Subject Area	Training Occupation Code Dim	Second Specialty Desc
Training and Attendance Subject Area	Training Org Dim	Area Team Code
Training and Attendance Subject Area	Training Org Dim	Area Team Name
Training and Attendance Subject Area	Training Org Dim	Effective End Date
Training and Attendance Subject Area	Training Org Dim	Effective Start Date
Training and Attendance Subject Area	Training Org Dim	Name
Training and Attendance Subject Area	Training Org Dim	Old Region Code
Training and Attendance Subject Area	Training Org Dim	Old Region Name
Training and Attendance Subject Area	Training Position Dim	Suitable For Int Recruit
Turnover Subject Area	Turnover Assignment Dim	Asg Census Nature Of Contract
Turnover Subject Area	Turnover Occupation Code Dim	Second Specialty Code
Turnover Subject Area	Turnover Occupation Code Dim	Second Specialty Desc
Turnover Subject Area	Turnover Organisation Dim	Area Team Code
Turnover Subject Area	Turnover Organisation Dim	Area Team Name
Turnover Subject Area	Turnover Organisation Dim	Effective End Date
Turnover Subject Area	Turnover Organisation Dim	Effective Start Date
Turnover Subject Area	Turnover Organisation Dim	Name
Turnover Subject Area	Turnover Organisation Dim	Old Region Code
Turnover Subject Area	Turnover Organisation Dim	Old Region Name
Turnover Subject Area	Turnover Position Dim	Pos Second Specialty Code
Turnover Subject Area	Turnover Position Dim	Pos Second Specialty Desc
Turnover Subject Area	Turnover Position Dim	Suitable For Int Recruit

Vacancy Return Subject Area	Vac Ret Dim	Vacancy Suit Int Rec
Vacancy Return Subject Area	Vac Ret Occupation Code Dim	Second Specialty Code
Vacancy Return Subject Area	Vac Ret Occupation Code Dim	Second Specialty Desc
Vacancy Return Subject Area	Vac Ret Org Dim	Area Team Code
Vacancy Return Subject Area	Vac Ret Org Dim	Area Team Name
Vacancy Return Subject Area	Vac Ret Org Dim	Effective End Date
Vacancy Return Subject Area	Vac Ret Org Dim	Effective Start Date
Vacancy Return Subject Area	Vac Ret Org Dim	Name
Vacancy Return Subject Area	Vac Ret Org Dim	Old Region Code
Vacancy Return Subject Area	Vac Ret Org Dim	Old Region Name
Vacancy Return Subject Area	Vac Ret Org Dim	Org SHA Name
Vacancy Return Subject Area	Vac Ret Position Dim	Pos Second Specialty Code
Vacancy Return Subject Area	Vac Ret Position Dim	Pos Second Specialty Desc
Vacancy Return Subject Area	Vac Ret Position Dim	Pos Suitable For Int Recruit
Vacancy Subject Area	Vac Dim	Vacancy Suit Int Rec
Vacancy Subject Area	Vac Occupation Code Dim	Second Specialty Code
Vacancy Subject Area	Vac Occupation Code Dim	Second Specialty Desc
Vacancy Subject Area	Vac Org Dim	Area Team Code
Vacancy Subject Area	Vac Org Dim	Area Team Name
Vacancy Subject Area	Vac Org Dim	Effective End Date
Vacancy Subject Area	Vac Org Dim	Effective Start Date
Vacancy Subject Area	Vac Org Dim	Name
Vacancy Subject Area	Vac Org Dim	Old Region Code
Vacancy Subject Area	Vac Org Dim	Old Region Name
Vacancy Subject Area	Vac Org Dim	Org SHA Code
Vacancy Subject Area	Vac Org Dim	Org SHA Name
Vacancy Subject Area	Vac Position Dim	Pos Second Specialty Code
Vacancy Subject Area	Vac Position Dim	Pos Second Specialty Desc
Vacancy Subject Area	Vac Position Dim	Pos Suitable For Int Recruit
WorkForce Composition Subject Area	Wfc Assignment Dim	Asg Census Nature Of Contract
WorkForce Composition Subject Area	Wfc Occupation Code Dim	Second Specialty Code
WorkForce Composition Subject Area	Wfc Occupation Code Dim	Second Specialty Desc
WorkForce Composition Subject Area	Wfc Organisation Dim	Area Team Code
WorkForce Composition Subject Area	Wfc Organisation Dim	Area Team Name

WorkForce Composition Subject Area	Wfc Organisation Dim	Effective End Date
WorkForce Composition Subject Area	Wfc Organisation Dim	Effective Start Date
WorkForce Composition Subject Area	Wfc Organisation Dim	Name
WorkForce Composition Subject Area	Wfc Organisation Dim	Old Region Code
WorkForce Composition Subject Area	Wfc Organisation Dim	Old Region Name
WorkForce Composition Subject Area	Wfc Position Dim	Pos Second Specialty Code
WorkForce Composition Subject Area	Wfc Position Dim	Pos Second Specialty Desc
WorkForce Composition Subject Area	Wfc Position Dim	Suitable For Int Recruit
WorkForce Composition Subject Area	Wfc Previous Organisation	Area Team Code
WorkForce Composition Subject Area	Wfc Previous Organisation	Area Team Name
WorkForce Composition Subject Area	Wfc Previous Organisation	Name
WorkForce Composition Subject Area	Wfc Previous Organisation	Old Region Code
WorkForce Composition Subject Area	Wfc Previous Organisation	Old Region Name
WorkForce Composition Subject Area	Wfc Supervisors	Clinical Supervisor Flag
WorkForce Composition Subject Area	Wfc Supervisors	Clinical Supervisor Name
WorkForce Composition Subject Area	Wfc Supervisors	Educational Supervisor Flag
WorkForce Composition Subject Area	Wfc Supervisors	Educational Supervisor Name
WorkForce Composition Subject Area	Wfc Supervisors	Other Info
WorkForce Movement Subject Area	Wfm Assignment Dim	Asg Census Nature Of Contract
WorkForce Movement Subject Area	Wfm Occupation Code Dim	Second Specialty Code
WorkForce Movement Subject Area	Wfm Occupation Code Dim	Second Specialty Desc
WorkForce Movement Subject Area	Wfm Org Dim	Area Team Code

WorkForce Movement Subject Area	Wfm Org Dim	Area Team Name
WorkForce Movement Subject Area	Wfm Org Dim	Effective End Date
WorkForce Movement Subject Area	Wfm Org Dim	Effective Start Date
WorkForce Movement Subject Area	Wfm Org Dim	Name
WorkForce Movement Subject Area	Wfm Org Dim	Old Region Code
WorkForce Movement Subject Area	Wfm Org Dim	Old Region Name
WorkForce Movement Subject Area	Wfm Position Dim	Pos Second Specialty Code
WorkForce Movement Subject Area	Wfm Position Dim	Pos Second Specialty Desc
WorkForce Movement Subject Area	Wfm Position Dim	Suitable For Int Recruit

The following 67 data items have been renamed as indicated:

Business Area Name	Folder Name	Data Item Name	New Data Item Name
Absence Rate Subject Area	Abs Rate Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Absence Rate Subject Area	Abs Rate Org Dim	Ocs Code	ODS Code
Absence Rate Subject Area	Abs Rate Org Dim	Site Code	HQ Site Code
Absence Rate Subject Area	Abs Rate Org Dim	Site Post Code	HQ Site Post Code
Absence Subject Area	Abs Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Absence Subject Area	Abs Org Dim	Ocs Code	ODS Code
Absence Subject Area	Abs Org Dim	Site Code	HQ Site Code
Absence Subject Area	Abs Org Dim	Site Post Code	HQ Site Post Code
Absence Subject Area	Abs Time Dim	Tm end date	Tm End Date
Absence Subject Area	Abs Time Dim	Tm start date	Tm Start Date
Demonstrated Skills Subject Area	Demo Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Demonstrated Skills Subject Area	Demo Org Dim	Ocs Code	ODS Code

Demonstrated Skills Subject Area	Demo Org Dim	Site Code	HQ Site Code
Demonstrated Skills Subject Area	Demo Org Dim	Site Post Code	HQ Site Post Code
Demonstrated Skills Subject Area	Personal Qualifications Dim	Skp Qual Awarded Date	Qual Awarded Date
Learning Subject Area	Learning Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Learning Subject Area	Learning Org Dim	Location	Site Code
Learning Subject Area	Learning Org Dim	Ocs Code	ODS Code
Learning Subject Area	Learning Org Dim	Site Code	HQ Site Code
Learning Subject Area	Learning Org Dim	Site Post Code	HQ Site Post Code
Payroll Subject Area	Payroll Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Payroll Subject Area	Payroll Org Dim	Ocs Code	ODS Code
Payroll Subject Area	Payroll Org Dim	Site Code	HQ Site Code
Payroll Subject Area	Payroll Org Dim	Site Post Code	HQ Site Post Code
Position Composition Subject Area	Pos Comp Organisation Dim	Ocs Code	ODS Code
Position Composition Subject Area	Pos Comp Organisation Dim	Site Code	HQ Site Code
Position Composition Subject Area	Pos Comp Organisation Dim	Site Post Code	HQ Site Post Code
Position Composition Subject Area	Pos Comp Position Dim	Pos Id	Position ID
Position Requirements Subject Area	Pos Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Position Requirements Subject Area	Pos Org Dim	Ocs Code	ODS Code
Position Requirements Subject Area	Pos Org Dim	Site Code	HQ Site Code
Position Requirements Subject Area	Pos Org Dim	Site Post Code	HQ Site Post Code
Position Requirements Subject Area	Pos Requirements Fact	Unique Nhs Id	Unique NHS ID
Position Requirements Subject Area	Pos Time Dim	Tm end date	Tm End Date
Position Requirements Subject Area	Pos Time Dim	Tm start date	Tm Start Date
Training and Attendance Subject Area	Training Assignment Dim	Reason for Bank Assignment	Fixed Term Reason

Training and Attendance Subject Area	Training Org Dim	Ocs Code	ODS Code
Training and Attendance Subject Area	Training Org Dim	Site Code	HQ Site Code
Training and Attendance Subject Area	Training Org Dim	Site Post Code	HQ Site Post Code
Training and Attendance Subject Area	Training Time Dim	Tm end date	Tm End Date
Training and Attendance Subject Area	Training Time Dim	Tm start date	Tm Start Date
Turnover Subject Area	Turnover Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
Turnover Subject Area	Turnover Fact	Nhs Id In Post End	NHS ID In Post End
Turnover Subject Area	Turnover Fact	Nhs Id In Post Start	NHS ID In Post Start
Turnover Subject Area	Turnover Fact	Nhs Id Joiners	NHS ID Joiners
Turnover Subject Area	Turnover Fact	Nhs Id Leavers	NHS ID Leavers
Turnover Subject Area	Turnover Organisation Dim	Ocs Code	ODS Code
Turnover Subject Area	Turnover Organisation Dim	Site Code	HQ Site Code
Turnover Subject Area	Turnover Organisation Dim	Site Post Code	HQ Site Post Code
Vacancy Return Subject Area	Vac Ret Org Dim	Ocs Code	ODS Code
Vacancy Return Subject Area	Vac Ret Org Dim	Site Code	HQ Site Code
Vacancy Return Subject Area	Vac Ret Org Dim	Site Post Code	HQ Site Post Code
Vacancy Subject Area	Vac Org Dim	Ocs Code	ODS Code
Vacancy Subject Area	Vac Org Dim	Org Site Code	HQ Site Code
Vacancy Subject Area	Vac Org Dim	Site Post Code	HQ Site Post Code
Workforce Composition Subject Area	Wfc Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
WorkForce Composition Subject Area	Wfc Organisation Dim	Ocs Code	ODS Code
WorkForce Composition Subject Area	Wfc Organisation Dim	Site Code	HQ Site Code
WorkForce Composition Subject Area	Wfc Organisation Dim	Site Postal Code	HQ Site Post Code
WorkForce Composition Subject Area	Wfc Position Dim	Pos Id	Position ID

WorkForce Composition Subject Area	Wfc Previous Organisation	Ocs Code	ODS Code
WorkForce Composition Subject Area	Wfc Previous Organisation	Site Code	HQ Site Code
WorkForce Composition Subject Area	Wfc Previous Organisation	Site Post Code	HQ Site Post Code
Workforce Movement Subject Area	Wfm Assignment Dim	Reason for Bank Assignment	Fixed Term Reason
WorkForce Movement Subject Area	Wfm Org Dim	Ocs Code	ODS Code
WorkForce Movement Subject Area	Wfm Org Dim	Site Code	HQ Site Code
WorkForce Movement Subject Area	Wfm Org Dim	Site Post Code	HQ Site Post Code

The following 15 data items have been moved from the Occupation Dim Folder to the Position Dim Folder in the same subject area:

Business Area Name	Folder Name	Data Item Name
Learning Subject Area	Learning Occupation Code Dim	Budgeted Wte
Learning Subject Area	Learning Occupation Code Dim	Contracted Hours
Learning Subject Area	Learning Occupation Code Dim	Contracted Sessions
Learning Subject Area	Learning Occupation Code Dim	DBS Disclosure Level
Learning Subject Area	Learning Occupation Code Dim	DBS Disclosure Type
Learning Subject Area	Learning Occupation Code Dim	Deanery Post Number
Learning Subject Area	Learning Occupation Code Dim	Position Number
Learning Subject Area	Learning Occupation Code Dim	Position Type
Learning Subject Area	Learning Occupation Code Dim	Sg Effective End Date
Learning Subject Area	Learning Occupation Code Dim	Sg Effective Start Date
Learning Subject Area	Learning Occupation Code Dim	Staff Group
Learning Subject Area	Learning Occupation Code Dim	Status
Learning Subject Area	Learning Occupation Code Dim	Title
Learning Subject Area	Learning Occupation Code Dim	Workplace Org Code
Learning Subject Area	Learning Occupation Code Dim	Workplace Org Name

8 Salary Sacrifice Reducing Balance Element

Two new elements are available to enable a Salary Sacrifice for an employee to be setup for a fixed amount to be taken over a set number of periods.

For each period, the element will reduce pay by a value equal to (Total Sacrifice Amount / Total Periods).

There will be a running total of the amount taken and the amount remaining for each element, and this will be reported on the element run results, in the payroll messages and in the employee payslip.

When the full amount has been taken, the element will cease taking deductions at the end of the period in which the final payment was taken.

A new report for Salary Sacrifice Reducing Balance elements is also available.

The two new elements are as follows:

- Salary Sacrifice Grp 0 RBal NHS
- Salary Sacrifice Grp 0 RBal NL NHS

Where RBal stands for Reducing Balance and NL stands for Non-Local Government Pension Scheme (in line with other Salary Sacrifice variants).

The elements have the following national Allowance Types and GRRs as follows:

- Cycle to Work
- Mobile Phone
- Tech

Local Allowance Types can also be added into the following lookups, if required.

- NHS_SAL_SAC_RBAL
- NHS_SAL_SAC_RBAL_NL

The element input values are as follows:

- Scheme** National or Local.
- Allowance Type** National Value or Local Value.
- Total Sacrifice Amount** The full amount to be sacrificed. This should be a negative amount in line with other Salary Sacrifice elements.
- Total Periods** The number of periods the deduction will be taken over.
- Start Date** Optional (used by report) - If a date is entered and this date is in the future then the sacrifice will not start until the period containing this date is reached.
- End Date** Optional (used by report) - This date is not used by the element calculation. The Salary Sacrifice continues until the Total Sacrifice Amt has been reached, regardless of the end date entered.
- Reference** Optional (used by report) – Free Text, the reference value for this item.

In the previous example the Sacrifice would be taken in Jul-21 and would produce the following payroll messages:

PYS: Sal Sac RBal Mobile Phone: Amt Already Sacrificed = £150

PYS: Sal Sac RBal Mobile Phone: Amt Outstanding = £450 over 3 periods

Similar messages would be produced in Aug-21 and Sep-21 with the amount paid and the amount outstanding being reported accordingly.

The final payment would be taken in Oct-21 and the messages in the final month would be

PYS: Sal Sac RBal Mobile Phone: Final Payment = £150

PYS: Sal Sac RBal Mobile Phone: Total Amt Sacrificed = £600

In this example the element entry would be end dated in the October payroll run and will have an end date of 31-Oct-21.

New Salary Sacrifice Reducing Balance Report

A new report is available to report on Salary Sacrifice Reducing Balance Elements as follows:

Navigation Path:

XXX Payroll Administration

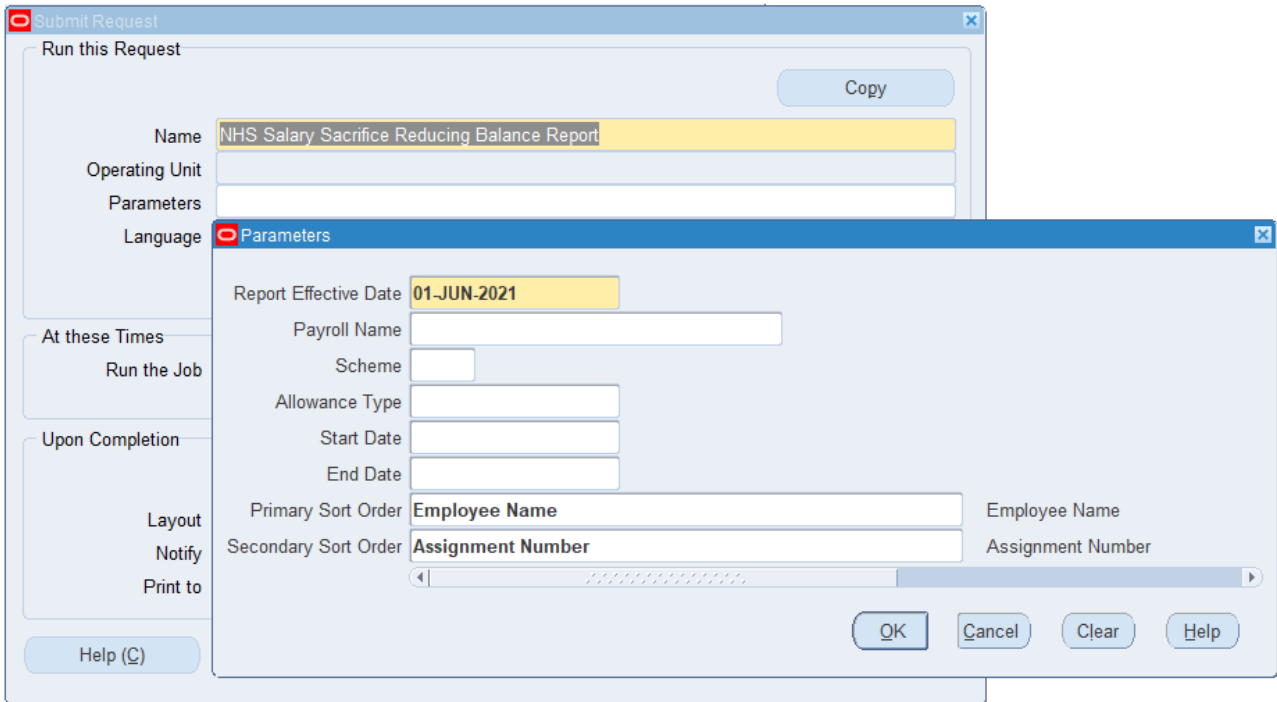
XXX Payroll Audit

XXX Payroll Super Administration

XXX Finance Reporting

XXX Finance Reporting and Hub Mapping

Requests > Submit Request > Single Request



Parameters:

Effective Date	Required.
Payroll	Optional.
Scheme	Optional.
Allowance Type	Optional.
Start Date	Optional.
End Date	Optional.
Primary Sort Order	Required – defaults to Employee Name. LoV has Employee Name, Assignment Number and Organisation.
Secondary Sort Order	Required – defaults to Assignment Number. LoV has Employee Name, Assignment Number and Organisation.

The output will be in Excel and will have the following Columns:

- Assignment Number
- Last Name
- First Name
- Organisation
- Scheme

- Allowance Type
- Start Date
- End Date
- Reference
- Total Repayment Amount
- Periods to be recovered over
- Amount recovered to date
- Outstanding balance
- Outstanding periods of recovery

Example Output of the Salary Sacrifice Reducing Balance Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Title	NHS Salary Sacrifice												
2	Date	Reducing Balance Report												
3	VPD	12-Mar-2021 16:06:58												
4		201												
5														
6	Effective Date	01-Jul-2021												
7	Payroll	201 Monthly												
8	Scheme													
9	Allowance Type													
10	Start Date													
11	End Date													
12														
13														
14	Assignment Number	Last Name	First Name	Organisation	Scheme	Allowance Type	Start Date	End Date	Reference	Total Repayment Amount	Periods To Be Recovered Over	Amount Recovered To Date	Outstanding Balance	Outstanding Periods Of Recovery
15	21012430	Smith01	Ben	201 Organisation 18234	NHS	Mobile Phone	01-Jul-21		MOB-VPD-001	-600	4	0	-600	4
16														

9 Added Years Calculation after Sickness

The Pension Added Years calculation has been amended so that the pensionable pay that is used while the employee is on sickness absence is taken from the pay period immediately before the absence start date.

This change is not retrospective.

10 HMRC Advisory Fuel Rates

HMRC has published new advisory fuel rates for company cars effective 01 June 2021 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	11p	8p
1401cc or 2000cc	13p	9p
Over 2000cc	19p	14p

Engine Size	Diesel
1600cc or less	*9p
1601cc or 2000cc	*11p
Over 2000cc	13p

Engine Size	Electric
1400cc or less	*4p
Over 1400cc	*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 Retropay is run, so any changes to amounts already paid must be made manually.