



ELECTRONIC STAFF RECORD

RN506 Guide to Enhancements and Changes Release 54.0.0.0 and 54.1.0.0

Information classification: PUBLIC

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1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 54.0.0.0 and 54.1.0.0. 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 SAS Doctors Appraisal Process Changes

New Appraisal Type in Self Service

Following the change applied in Release 53 at the end of March enabling SAS Pay Progression reviews to be recorded in ESR via the Appraisal and Development Summary EIT, from this release the functionality will also be available in Self Service.

The SAS Pay Progression Review Appraisal Type has its own Appraisal Template and Questionnaire.


This can be selected from the Standard Appraisal page as per the other appraisal types and it should be used in conjunction with its associated template.

Create Standard Appraisal: Setup Details












Step 1 of 2

Employee Name **SASA**
Employee Number **20066700**

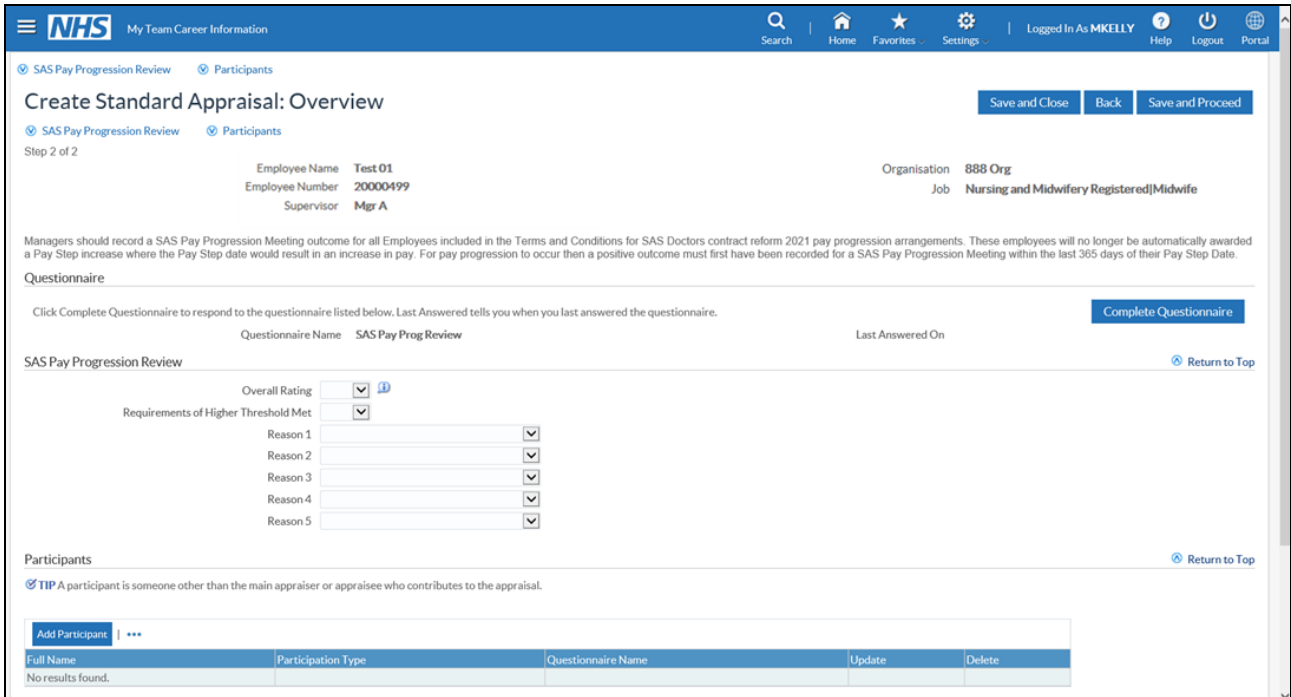
Setup Details

 **TIP** You cannot change the appraisal template or the assignment after clicking Next.

* Indicates required field

* Review Type	SAS Pay Progression Review	
* Period Start Date	01-Apr-2022	 
* Period End Date	31-Mar-2023	 
* Template	SAS Pay Progression Review	
* Appraisal Date	10-Apr-2022	 
Next Appraisal Date	10-Apr-2023	 
Assignment Number	20066700	
* Main Reviewer	Mgr A	

The SAS Pay Progression Review type has been restricted down to a set of relevant fields and a questionnaire.



The fields for this review type are as follows:

Overall Rating

SAS Pay Progression Review

Overall Rating ⓘ

Higher Threshold Requirement Met ⓘ

This field has allowable values of '1-Yes' and '2-No'.

Higher Threshold Requirement Met

This field has allowable values of '1-Yes' and '2-No'.

Validation within this page will prevent this value being entered if the assignment is not on one of the grade steps that require the higher threshold requirements to be met.

Where the assignment is on one of these grade steps then this value is required and must match the value used for Overall Rating.

Reasons

There are five Non Progression Reason fields that can be entered.

The nationally supplied reasons, that can be selected from the List of Values (LoV), are as shown in the screenshot. This list is also locally extensible via the lookup NHS_AFC_PAY_NON_PROG which contains both SAS and AfC Reasons.

Where the Overall Rating is 'No', it is mandatory that the Reason 1 field is completed with one of the reasons from the LoV.

Update Standard Appraisal: Overview
Step 2 of 2

Employee Name: Test 01
Employee Number: 20000499
Supervisor: Mgr A

Organisation: 888 Org
Job: Nursing and Midwifery Registered|Midwife

Managers should record a SAS Pay Progression Meeting outcome for all Employees included in the Terms and Conditions for SAS Doctors contract reform 2021 pay progression arrangements. These employees will no longer be automatically awarded a Pay Step increase where the Pay Step date would result in an increase in pay. For pay progression to occur then a positive outcome must first have been recorded for a SAS Pay Progression Meeting within the last 365 days of their Pay Step Date.

Questionnaire

Click Complete Questionnaire to respond to the questionnaire listed below. Last Answered tells you when you last answered the questionnaire.

Questionnaire Name	Last Answered On
SAS Pay Prog Review	

SAS Pay Progression Review [Return to Top](#)

Overall Rating: 2-No [?](#)

Requirements of Higher Threshold Met: 2-No

Reason 1: [?](#)
When Overall Rating is No, a reason is required.

Reason 2: [?](#)

Reason 3: [?](#)

Reason 4: [?](#)

Reason 5: [?](#)

The remaining reason fields remain optional and should be completed as required.

The Requirements of Higher Threshold Met field is disabled for an assignment on a grade step that does not require the higher threshold requirements to be met.

SAS Pay Progression Review

Overall Rating: 2-No [?](#)

Requirements of Higher Threshold Met: 2-No

Reason 1: [?](#)

- Anonymous colleague and patient multisource feedback not completed
- Formal capability process is in place
- Formal live disciplinary action on record
- Full audit cycle not performed
- Learning to others not delivered
- Not participated satisfactorily in the yearly job planning process
- Not participated satisfactorily in the yearly medical appraisal process
- Statutory and/or mandatory training not completed

There are three additional reasons that become available where the assignment is on a grade step that requires the higher threshold requirements to be met.

SAS Pay Progression Review

Overall Rating 2-No

Requirements of Higher Threshold Met 2-No

Reason 1	Anonymous colleague and patient multisource feedback not completed
Reason 2	Formal capability process is in place
Reason 3	Formal live disciplinary action on record
Reason 4	Full audit cycle not performed
Reason 5	Learning to others not delivered
	Not demonstrated the ability for decision making or unsupervised responsibility
	Not met the standard pay progression criteria
	Not participated satisfactorily in the yearly job planning process
	Not participated satisfactorily in the yearly medical appraisal process
	Not provided evidence to demonstrate contributions to a wider role
	Statutory and/or mandatory training not completed

Participants

TIP A participant is someone other than the main appraiser

There is also a Questionnaire specific to this Review Type.

Answer Questionnaire

SAS Pay Prog Review

Follow the instructions for completing the questionnaire below, then click Apply.

NATIONAL HEALTH SERVICE

Summary of SAS Pay Progression Review Meeting

Doctor Summary

Manager Summary

Action Plan and Timescales
Manager and doctor to agree an action plan and timescales if the employee does not meet the required standards.

Progression through Higher Threshold
(Speciality Doctors Only)

This can be completed by the Appraiser and/or by the Appraisee if it is shared with them.

This Questionnaire is also available for download and completion offline by the appraiser and/or the appraisee.

A	B	C	D	E	F	G	H	I
1	Update Appraisal : Overview							
2	Employee Name	Mr. Mark	Employee Number	20066125				
3	Organization Email Address		Department	Ward A				
4	Manager	Mgr A	Job	Medical and Dental Specialty Doctor				
5	Setup Details							
6	Initiator	Mgr A	Main Appraiser	Mgr A				
7	Appraisal Date	2022-05-26	Next Appraisal Date					
8	Period Start Date	2022-05-01	Period End Date	2023-04-30				
9	Appraisal Purpose	SAS Pay Progression Review		Template	SAS Pay Progression Meeting			
11	Overall Rating and Comments							
12	Overall Rating	1-Yes						
13		<i>Note: Where progression through a Higher Threshold (Specialty Doctors only) applies, the relevant fields must be completed online</i>						
16	Questionnaire							
19	1. Doctor Summary							
21		Doctor Summary Details - updated offline						
25	2. Manager Summary							
27		Managers Summary Details - updated offline						
31	3. Action Plan and Timescales							
33		Action Plan and Timescales Details - updated offline						
37	4. Progression through Higher Threshold (Specialty Doctors only)							
39		Progression through Higher Threshold Details - updated offline						

NOTE: There is no validation on the form so where progression through a Higher Threshold (Specialty Doctors only) applies, the relevant fields must be completed online or it will error.

New Notifications

A new set of notifications have been delivered to inform users where assignments caught by the SAS progression rules are approaching their Increment Dates.

There will be three notifications, one for the affected employee, one for their manager and one for a new role called ‘SAS Pay Progression’.

Notification for Employees

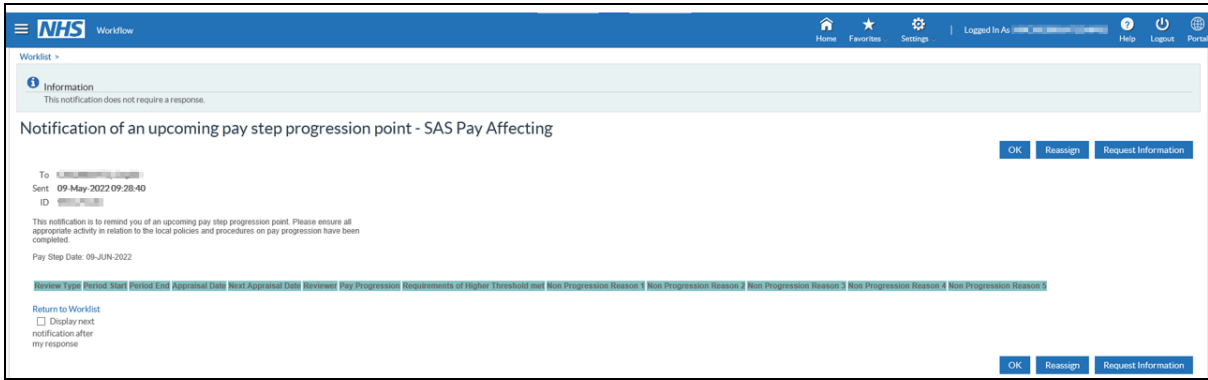
To be sent 122 days (approx. four months) before their increment date and 31 days (approx. 1 month) before their Increment date.

A scheduled concurrent program will run overnight every night, to initiate the employee notification workflow.

This will identify employee assignments who:

- Are caught by the new rules
- Have their increment date at (run date + 31 days) or (run date + 122 days)
- The proposed increment for the assignment would be Pay Affecting

If for any reason the process does not run one night, the next run will pick up any missed assignments since the last successful run.



This notification will also be emailed to employees, where an appropriate email address is held for them.

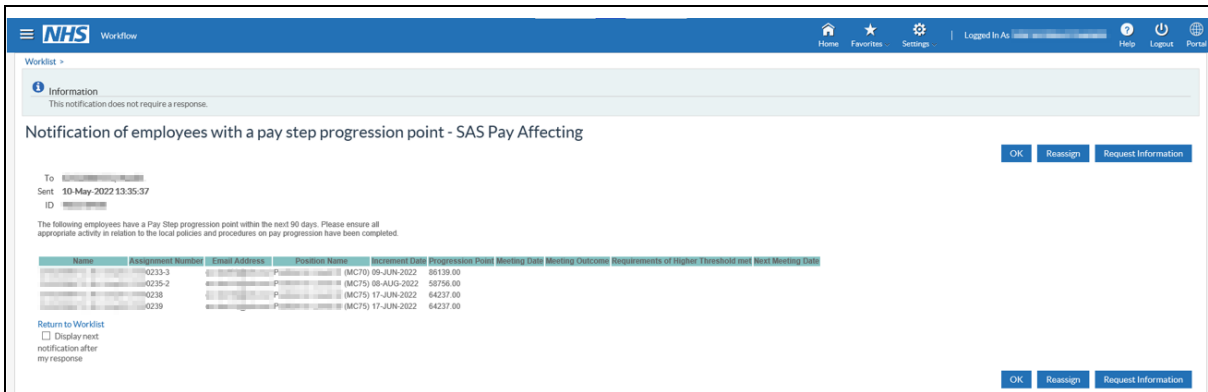
Notification for Managers

A scheduled concurrent program will run once per month to initiate the manager notification workflow.

This will identify employee assignments who:

- Are caught by the new rules
- Have their increment date within the next 90 days
- The proposed increment would be Pay Affecting

Each manager with at least one employee assignment identified above will receive a notification listing all the affected assignments reporting to them.



Only Appraisal and Development review EIT rows of Review type 'SAS Pay Progression Review' and with an appraisal date in the previous year from the assignment increment date will be considered.

If multiple rows exist, then the one with the latest value of appraisal date will be used for the assignment.

If no matching EIT rows exists (in the previous year from the increment date) then these values will be blank in the notification.

This notification will also be emailed to the managers, where an appropriate email address is held for them.

Notification for Role Holder

A scheduled concurrent program will run once per month to initiate the role notification workflow.

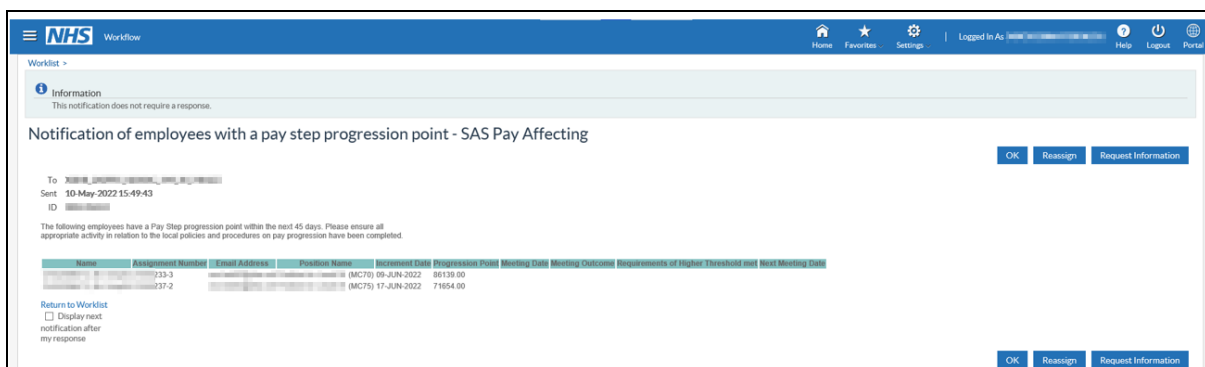
This will identify employee assignments who:

- Are caught by the new rules.
- Have their increment date within the next 45 days
- The proposed increment would be Pay Affecting

Role holders in each role with at least one employee assignment identified above will receive a notification listing all the affected assignments for their role.

Where there are multiple role holders for the same role, then the first to read a notification will close it for all role holders.

Where there are no role holders for a given role, then no notification will be sent to this role.



The logic for which Appraisal EIT rows are to display for each assignment will be the same as for the manager notification.

This notification will also be emailed to the role holders, where an appropriate email address is held for them.

There will be a national role to receive this notification called 'SAS Pay Progression Role'. Locally trusts may split this functionality and have a mix of the national role and one or more local roles. Any local role that matches the format '%SAS Pay Prog%' may be entered against the Organisation DFF to override the role to which notifications will go to for that organisation and all organisations beneath it in the organisation hierarchy.

A new segment, SAS Pay Progression Role, has been defined on the Organisation DFF for this purpose.

The screenshot shows a dialog box titled "Add1 Org. Unit Details". It contains several input fields for organizational information. The "SAS Pay Progression Role" field is highlighted and contains the text "201 SAS Pay Progression". Other fields include "Organisation End Date Reason", "Welsh Organisation Translation", "Agenda for Change Effective Date", "Hosted Organisation", "CRS Organisation NACS Code", "Department Manager", "NHS CRS Worklist", "NHS CRS Sponsor", "Payroll Approval Role", "IAT Standard Reference Approval", "Stat & Mand Competence Role", "PDS Notification Role", "Pay Progression Role", "Target Organisation", and "Foundation Trust Effective Date". At the bottom, there are buttons for "OK", "Cancel", "Clear", and "Help".

Where an assignment is to be added into the role notification, the process will check for an override role defined for the organisation that the assignment is in. If none is found, then the process will proceed up the organisation hierarchy, looking for override values at each level. The first one it finds populated will be used for the assignment and if no overrides are found the default national role will be used.

Update to the Deferral of Pay Progression Notifications

The existing Deferral of Pay Progression notifications have been updated so that they are now triggered by a 'No' being recorded in the new 'SAS Pay Progression Review' appraisal type in addition to the existing appraisal types that trigger this notification.

The screenshot shows an NHS Workflow notification interface. At the top, it says "Information" and "This notification does not require a response." The main title is "Deferral of Pay Progression". Below this, it shows the sender as "SYSADMIN" and the date as "25-May-2022 14:58:32". A message states: "The pay progression will automatically be deferred based on the outcome of the appraisal process at the next increment date for the following Employees:". Below this is a table with the following data:

Name	Assignment Number	Appraisal Type	Appraisal Date	Increment Date	Deferral Date	Supervisor	Supervisor Email	Main Reviewer	Main Reviewer Email	Comments
[Redacted]	54-2	SAS Pay Progression Review	28-APR-2022	17-JUN-2022	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

At the bottom, there is a "Return to Workflow" section with a checkbox "Display next notification after my response" and buttons for "OK", "Reassign", and "Request Information".

3 ESRBI Reporting Changes for SAS Doctors

The following BI changes have been made as part of the enhanced review process for SAS Doctors.

Human Resources - Assignment EIT Subject Area

The new field, Requirements of Higher Threshold Met, has been added into the Human Resources - Assignment EIT Subject Area within the EIT Appraisals and Development Summary folder.

Human Resources - Appraisal and PMPs Subject Area

The new field, Requirements of Higher Threshold Met, has been added into the Human Resources – Appraisals and PMPs Subject Area within the Appraisal folder.

4 Change to Health and Care Professions Council (HCPC) Registration and Membership EIT

The Registration and Membership EIT for the Health and Care Professions Council (HCPC) has been updated to include two new fields:

- Podiatric Surgery
- Medical Exemption

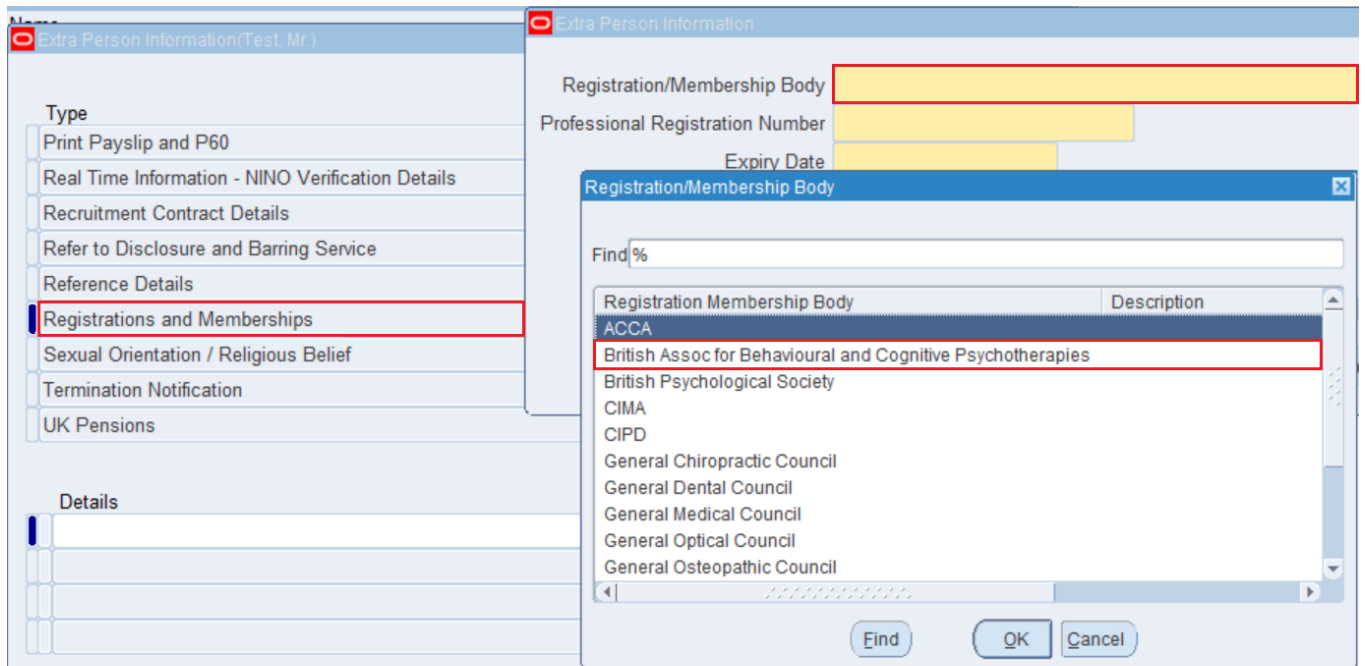
Both fields are Yes/No and the new values are also available in ESR BI and the Data Warehouse.

5 New Registration/Membership Body

A new value 'British Assoc for Behavioural and Cognitive Psychotherapies' will be added to the "Registration/Membership Body" list of values in the 'Registrations and Memberships'.

Navigation Details:

- XXX HR Administration > People > Enter and Maintain > Others > Extra Information > Registrations and Memberships
- XXX HR Data Entry > People > Enter and Maintain > Others > Extra Information > Registrations and Memberships
- XXX HR Management > People > Enter and Maintain > Others > Extra Information > Registrations and Memberships



This value will be reflected in BI Reporting and in the Data Warehouse in Release 55.0.0.0.

6 Changes to National Insurance Threshold

Following the Chancellor's Spring Statement, ESR has been updated with the new increased Primary Threshold for the calculation of National Insurance with effect from 06 July 2022.

The new values from 06 April 2022 are:

Weekly = £242

Monthly = £1048

Yearly = £12570

7 Enhancement to the NHS Retro-Pay Process

The NHS Retro-Pay (Frequency) process has been enhanced to now include a new process which will assess the size of the assignment sets created. If they reach the maximum size, the new process will split the assignment set into parts to enable easier processing of large assignment sets by the retro pay by element process.

8 **Removal of Report/Data Items**

Following a review of reports and data items, the following have been disabled/end dated. This will be effective following the release:

1. 'NHS HMRC EDI File Status Report' has been disabled and it will be no longer available to run following this Release.
2. The exception "WTD element missing' is removed from the Payroll Exceptions Management functionality.
3. The NHS Pre Payroll Exception Report will have the following items removed:
 - No WTD
 - Pension <> D,E Opted Out = N, Pension NHS
4. The NHS Pensions Exceptions Report and the Payroll Exceptions Management functionality, will no longer report on the NHS Pension Capacity Code mismatches.

To assist users to identify employees who may be on the wrong pension band, or are near the edge of a band, the ESR BI Pension Banding analysis is available on the Pensions Dashboard. Additionally, the Pension Reassessment process is available to assess and amend contribution rates for certain pay affecting changes throughout the year.

9 EAT Holiday Pay for Wales

In line with the Welsh Government's agreement in respect of overtime payments during annual leave, the following change is being delivered in this release, and is applicable for Welsh Organisations only. The change applies to substantive AfC staff, bank staff are not automatically included in the entitlement, however the functionality has the ability for AfC bank staff to be added locally if required.

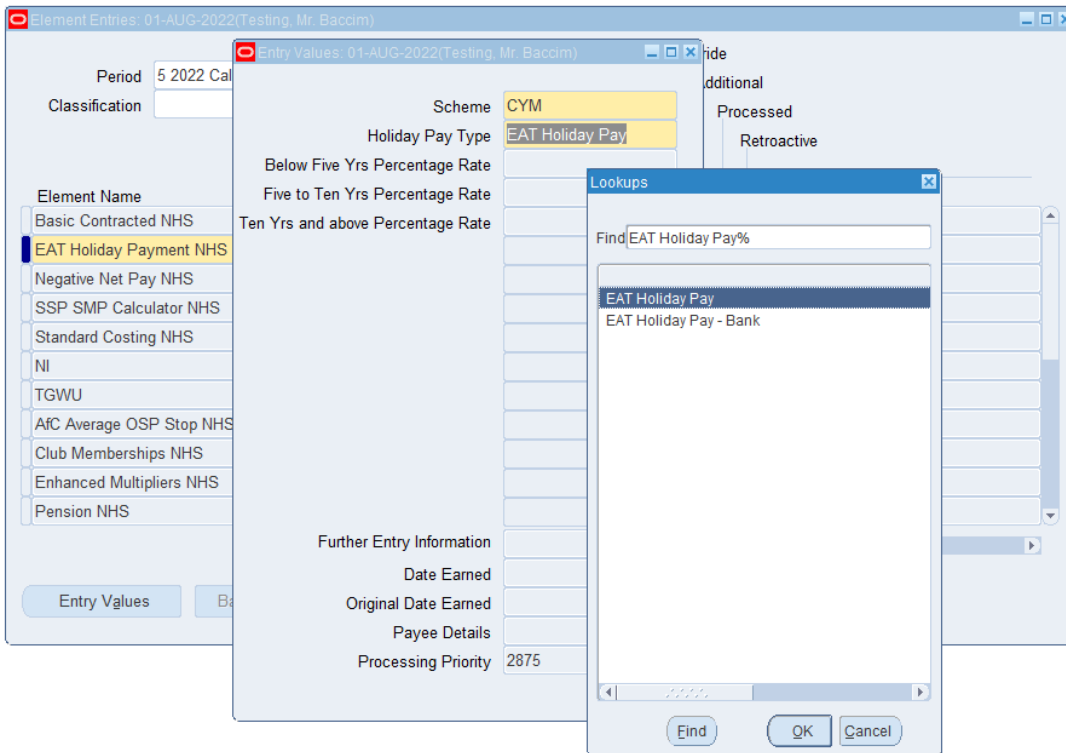
Two new elements are being introduced to enable payment to be made:

- EAT Holiday Payment NHS
- EAT Holiday Pay Override NR NHS

EAT Holiday Payment NHS

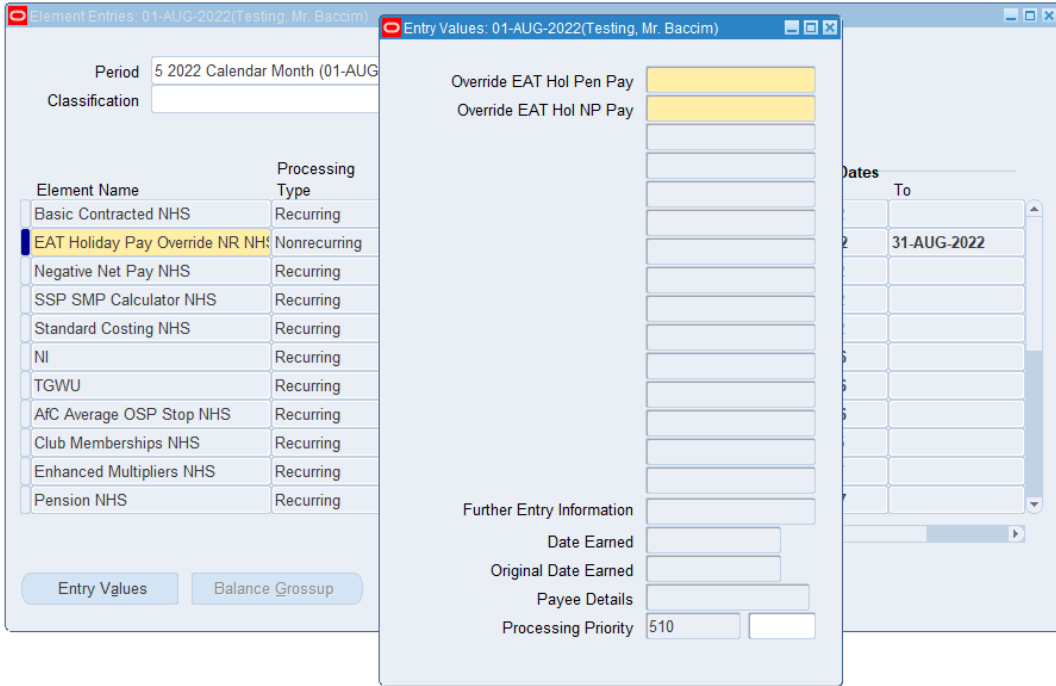
This is a recurring element which will be applied to all existing Welsh assignments as part of the release and will be added automatically when new assignments are created. The element will apply a percentage rate to specific elements at the point that they are paid. The payments will be both pensionable and non-pensionable depending on the pensionable status of the element that it is being applied to.

The element will contain a Holiday Pay Type with a choice of 2 values, EAT Holiday Pay and EAT Holiday Pay – Bank. The default will be EAT Holiday Pay, if organisations wish to allow the payment for a bank assignment, the Holiday Pay Type will need to be amended locally to EAT Holiday Pay – Bank.



EAT Holiday Pay Override NR NHS

This non-recurring element will allow a cash period override to be entered for pensionable and non-pensionable payments. If used, it will override the amounts calculated by the recurring element and pay the values entered instead.



EAT Holiday Pay Elements Form

The elements to be included in calculation of EAT Holiday Pay are defined via the EAT Holiday Pay Elements form.

This form will be available from the following menu path:

My ESR Dashboard > ESR Navigator
 XXX Payroll Super Administration > Payroll > EAT Holiday Pay Elements

EAT Holiday Pay Elements Config.

Search

Note that the search is case insensitive

Result Element

... Rows 1 to 16

Result Element	Worked IV	Input Element	Input Value	Include/Exclude	Start Date	End Date	Update	Delete
Acting Up Adj OT PAY NHS	Units Worked	Acting Up Adj NR NHS	Overtime Units	Include	01-Jul-2022			
Additional Basic Pay NHS	Units Worked	Basic NR NHS	Basic Units	Include	01-Jul-2022			
Bank Holiday OT PAY NHS	Units Worked	Overtime NR NP NHS	Bank Holiday Overtime	Include	01-Jul-2022			
Emergency Work NR NP PAY NHS	Units Worked	Emergency Work NR NP NHS	Hours Worked	Include	01-Jul-2022			
Emergency Work NR PAY NHS	Units Worked	Emergency Work NR NHS	Hours Worked	Include	01-Jul-2022			
Emergency Work PT NR PAY NHS	Units Worked	Emergency Work Part Time NR NHS	Hours Worked	Include	01-Jul-2022			
Night Duty OT PAY NHS	Units Worked	Overtime NR NP NHS	Night Duty Overtime	Include	01-Jul-2022			
Plain Time OT PAY NHS	Units Worked	Overtime NR NP NHS	Plain Time Overtime	Include	01-Jul-2022			
Rest Day OT PAY NHS	Units Worked	Overtime NR NP NHS	Rest Day over WT	Include	01-Jul-2022			
Saturday OT PAY NHS	Units Worked	Overtime NR NP NHS	Saturday Overtime	Include	01-Jul-2022			
Special Allowance OT PAY NHS	Units Worked	Special Allowance NR NHS	Overtime Units	Include	01-Jul-2022			
Sunday OT PAY NHS	Units Worked	Overtime NR NP NHS	Sunday Overtime	Include	01-Jul-2022			

The national set of elements included in the calculation of EAT Holiday Pay are:

- Acting Up Adj OT PAY NHS
- Additional Basic Pay NHS
- Emergency Work NR PAY NHS
- Emergency Work NR NP PAY NHS
- Emergency Work PT NR PAY NHS
- Bank Holiday OT PAY NHS
- Night Duty OT PAY NHS
- Plain Time OT PAY NHS
- Rest Day OT PAY NHS
- Saturday OT PAY NHS
- Sunday OT PAY NHS
- Unsocial OT PAY NHS
- Weekday OT PAY NHS
- Special Allowance OT PAY NHS
- Work Done NP PAY NHS
- Work Done PAY NHS

Organisations will have the ability to include any additional elements or exclude the elements added at a national level, as per their local requirements, using the Create New Configuration form.

NOTE: Organisations will not be able to amend the national list of elements in the table. However, they will be able to apply the following local variations for their organisation:

- Exclude an element in the national list by adding a new row at local level for the same element with the 'Exclude' option selected so that the element will be excluded only for that organisation.
- Add any other national element which is not included in the national list or a locally created element by adding a new row with 'Include' option selected.
- Update or delete any element that has been added locally to the table.

Creating a New Configuration

EAT Holiday Pay Elements Config.

Search

Note that the search is case insensitive

Result Element

| ... Rows 1 to 16

Result Element ▲	Worked IV ▲	Input Element ▲	Input Value ▲	Include/Exclude ▲	Start Date ▲	End Date ▲	Update	Delete
Acting Up Adj OT PAY NHS	Units Worked	Acting Up Adj NR NHS	Overtime Units	Include	01-Apr-2022			
Additional Basic Pay NHS	Units Worked	Basic NR NHS	Basic Units	Include	01-Apr-2022			
Bank Holiday OT PAY NHS	Units Worked	Overtime NR NP NHS	Bank Holiday Overtime	Include	01-Apr-2022			
Emergency Work NR NP PAY NHS	Units Worked	Emergency Work NR NP NHS	Hours Worked	Include	01-Apr-2022			
Emergency Work NR PAY NHS	Units Worked	Emergency Work NR NHS	Hours Worked	Include	01-Apr-2022			
Emergency Work PT NR PAY NHS	Units Worked	Emergency Work Part Time NR NHS	Hours Worked	Include	01-Apr-2022			
Night Duty OT PAY NHS	Units Worked	Overtime NR NP NHS	Night Duty Overtime	Include	01-Apr-2022			
Plain Time OT PAY NHS	Units Worked	Overtime NR NP NHS	Plain Time Overtime	Include	01-Apr-2022			

1. To include a new element for your trust or to exclude the element included in the table at national level, click **Create New Configuration**.

Create EAT Element Configuration

* Indicates required field

* Result Element

* Worked Input Value

* Input Element

* Input Value

* Include/Exclude

* Start Date

End Date

2. Search for the required element in the **Result Element** field. The remaining fields will depend on the element selected for the information available in the LoV.
3. Click in the **Worked Input Value** field and select as applicable from the LoV.
4. Click in the **Input Element** field and select as applicable from the LoV.
5. Click in the **Input Value** field and select as applicable from the LoV.
6. Click in the **Include/Exclude** field and select as applicable from the LoV.

NOTE: Include should be selected if new elements are to be included in the EAT Holiday Pay calculation and Exclude should be selected if either an element from the national list or a locally added element needs to be excluded from the calculation.

7. Click in the **Start Date** field and enter as applicable.
8. Click in the **End Date** field and enter as applicable.
9. Click **Apply**.

Default Percentage Rates

The element will have an option of three percentage choices and will be dependent on the employee's annual leave entitlement. This will be based on the Latest Start Date along with the information held against the Aggregate Service information held in the Person DFF.

The default percentage rates that have been set up in the element, can be amended at local level via the GRR form:

- Less than five years – 12.07%
- Five to ten years – 13.04%
- Ten years and above – 15.04%

There are 2 GRR schemes, a national (CYM) scheme and a local (VPD) scheme, as detailed in the below table. The CYM scheme cannot be amended at local level. The VPD scheme has been created to enable organisations to amend the percentage rates locally for their VPD as required. It is the VPD scheme that will be used on the EAT Holiday Pay element when it is automatically added to an assignment.

Element Name	Scheme	Holiday Pay Type	Below Five Yrs Percentage Rate	Five to Ten Yrs Percentage Rate	Ten Yrs and above Percentage Rate
EAT Holiday Payment NHS	CYM	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	001	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	020	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	025	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	028	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	040	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	043	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	050	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	070	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	082	EAT Holiday Pay	12.07	13.04	15.04

EAT Holiday Payment NHS	100	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	110	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	120	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	130	EAT Holiday Pay	12.07	13.04	15.04
EAT Holiday Payment NHS	CYM	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	001	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	020	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	025	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	028	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	040	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	043	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	050	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	070	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	082	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	100	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	110	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	120	EAT Holiday Pay - Bank	12.07	13.04	15.04
EAT Holiday Payment NHS	130	EAT Holiday Pay - Bank	12.07	13.04	15.04

EAT Holiday Pay Calculations

The EAT Holiday Pay will calculate the sum of the applicable pensionable and non-pensionable elements processed for an assignment in the pay period and apply the percentage rate applicable to the employee, dependant on the information held in the Aggregate Service field:

Total value of overtime/additional hours paid = a

Derive percentage value to be applied based on Aggregate Service = b

Multiply the defined percentage rate by the total payment – $a \times b$ = amount due for payment against the relevant EAT Holiday Pay element.

Where annual leave entitlement increases due to length of service, the applicable percentage rate will be updated from the beginning of the next unpaid period. For example, service changes to five years on the 14th April, the percentage rate for five years and over will change on the 1st May for a monthly paid employee.

10 HMRC Advisory Fuel Rates

HMRC has published new advisory fuel rates for company cars effective 01 Jun 2022 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	14p	9p
1401cc to 2000cc	17p	11p
Over 2000cc	25p	16p

Engine Size	Diesel
1600cc or less	13p
1601cc to 2000cc	16p
Over 2000cc	19p

Engine Size	Electric
1400cc or less	*5p
Over 1400cc	*5p

* No change has been made to the Electric 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 will need to be made manually.

11 Updates to Competency Expiry and Competence Requirements Change Notifications and Emails

The wording on the Employee Competence Expiry Notifications/Emails and the Competence Requirements Change Notifications/Emails have been updated to direct the learner to the My Compliance Portlet. The wording for the Competence Expiry 1 Month and Short Notice notifications has been changed where the learner is already enrolled onto learning which will award the competence. No changes have been made to the other versions of these notifications.

Competence Expiry - 1 Month Text

Subject: For Your Information: Competence Expiry – 1 Month

Body: The training that you completed to achieve your competence, <competence name>, is due to expire on dd-mmm-yyyy.

Please log in to ESR and view the My Compliance Portlet. From here you can play or search for available training to update your record.

You can review your existing learning by logging into ESR and accessing the My Learning page

This information has also been sent to your manager for their records.

<https://my.esr.nhs.uk>

Competence Expiry - Short Notice Text

Subject: For Your Information: Competence Expiry - Short Notice

Body: The Electronic Staff Record has identified that your competence, <competence name> expiry date has been updated at short notice from dd-mmm-yyyy to dd-mmm-yyyy.

Please log in to ESR and view the My Compliance Portlet. From here you can play or search for available training to update your record.

This information has also been sent to your manager for their records.

<https://my.esr.nhs.uk>

Competence Expiry - 3 Month Text

Subject: For Your Information: Competence Expiry - 3 Months

Body: The training that you completed to achieve your competence, <competence name> is due to expire on dd-mmm-yyyy.

Please log in to ESR and view the My Compliance Portlet. From here you can play or search for available training to update your record.

This information has also been sent to your manager for their records.

<https://my.esr.nhs.uk>

Competence Requirements Change Text

Subject: For Your Information: Competence Requirements Change

Body: A change has been made that may have affected your competence requirements.

Please review these by logging into ESR and viewing the My Compliance Portlet. Any gaps in your competency profile will be identified and you can play or search for available training to update your record.

<https://my.esr.nhs.uk>

12 National Workforce Dataset - ESR Amendments

The National Workforce Data set which is maintained by NHS Digital has been updated and version 3.3 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. Job Role/ Staff Group

The following 38 Staff Group / Job Roles have been created:

Main Staff Group	Job Role	Date From	Date To
Medical and Dental	Specialist	01-JAN-1951	
Nursing and Midwifery Registered	Sonographer	01-JAN-1951	
Nursing and Midwifery Registered	Nurse - Advanced Practitioner	01-JAN-1951	
Nursing and Midwifery Registered	Midwife - Advanced Practitioner	01-JAN-1951	
Nursing and Midwifery Registered	Trainee Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Sonographer	01-JAN-1951	
Allied Health Professionals	Art Therapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Chiropodist/Podiatrist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Dietitian Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Dramatherapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Multi Therapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Music Therapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Occupational Therapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Operating Department Practitioner Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Orthoptist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Orthotist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Osteopath Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Paramedic Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Physiotherapist Advanced Practitioner	01-JAN-1951	

Allied Health Professionals	Prosthetist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Radiographer - Diagnostic Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Radiographer - Therapeutic Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Speech and Language Therapist Advanced Practitioner	01-JAN-1951	
Allied Health Professionals	Trainee Advanced Practitioner	01-JAN-1951	
Add Prof Scientific and Technic	Sonographer	01-JAN-1951	
Add Prof Scientific and Technic	Trainee Advanced Practitioner	01-JAN-1951	
Healthcare Scientists	Sonographer	01-JAN-1951	
Healthcare Scientists	Healthcare Scientist Advanced Practitioner	01-JAN-1951	
Healthcare Scientists	Healthcare Science Practitioner Advanced Practitioner	01-JAN-1951	
Healthcare Scientists	Trainee Advanced Practitioner	01-JAN-1951	
Administrative and Clerical	Chief Operating Officer	01-JAN-1951	
Administrative and Clerical	Chief People Officer	01-JAN-1951	
Administrative and Clerical	Chief Information Officer	01-JAN-1951	
Administrative and Clerical	Estates and Facilities Director	01-JAN-1951	
Administrative and Clerical	Deputy Chief Executive	01-JAN-1951	
Administrative and Clerical	Chief Strategy Officer	01-JAN-1951	
Administrative and Clerical	Chief Sustainability Officer	01-JAN-1951	
Administrative and Clerical	Improvement Director	01-JAN-1951	

The following four Staff Group / Job Roles have been end-dated:

Main Staff Group	Job Role	Date From	Date To
Add Prof Scientific and Technic	Approved Mental Health Professional	01-JAN-1951	30-JUN-2022
Allied Health Professionals	Advanced Practitioner	01-JAN-1951	30-JUN-2022
Nursing and Midwifery Registered	Advanced Practitioner	01-JAN-1951	30-JUN-2022
Additional Clinical Services	Technical Instructor	01-JAN-1951	30-JUN-2022

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

Main Staff Group	Old Job Role	New Job Role	Date From	Date To
Administrative and Clerical	Library and Knowledge Services Professional	Knowledge and Library Services Professional	01-JAN-1951	
Administrative and Clerical	Library and Knowledge Services Paraprofessional	Knowledge and Library Services Paraprofessional	01-JAN-1951	
Additional Clinical Services	Pre-reg Pharmacist	Trainee Pharmacist	01-JAN-1951	

The following Job Role has had its Main Staff Group changed:

Current Staff Group	Current Job Role	New Staff Group
Medical and Dental	Medical Student	Students

Existing Positions with the 'old' value will have it replaced with the 'new' or 'renamed' one.

2. Area of Work

The following thirteen Area of Work values have been created:

Area of Work (Pri/Sec/Ter)	Date From
Pathology Haematology Haemato-oncology	01-JAN-1951
Pathology Pathology Molecular Pathology	01-JAN-1951
Pathology Histopathology Histological Dissection	01-JAN-1951
Pathology Histopathology Gastrointestinal Pathology Reporting	01-JAN-1951
Pathology Histopathology Gynaecological Pathology Reporting	01-JAN-1951
Pathology Histopathology Dermatopathology Reporting	01-JAN-1951
Imaging Nuclear Medicine Ionising Radiation	01-JAN-1951
Clinical Support Clinical Support Simulation Technology	01-JAN-1951
Pathology Pathology Cancer Genomics	01-JAN-1951
Medicine Clinical Genetics Cancer Clinical Genetics	01-JAN-1951

Medicine Clinical Cytogenetics and Molecular Genetics Cancer Molecular Genetics	01-JAN-1951
Pathology Reproductive Sciences Andrology	01-JAN-1951
Pathology Reproductive Sciences Embryology	01-JAN-1951

The following two Area of Work values have been updated:

Old Area of Work (Pri/Sec/Ter)	New Area of Work (Pri/Sec/Ter)
Pathology Cellular Sciences Reproductive Science	Pathology Reproductive Sciences Reproductive Sciences
Corporate Informatics Library and Knowledge Management	Corporate Informatics Knowledge and Library Management

The bold text represents the changed value.

Existing Positions with the 'old' tertiary values have had them updated with the new/renamed values.

3. Nationality

The following three Nationalities have been added:

Nationality	Date From
Bisau-Guinean	01-JAN-1951
Macanese	01-JAN-1951
South Sudanese	01-JAN-1951

The following four Nationalities have been end-dated:

Nationality	Date From	Date To
Chuukese	01-JAN-1951	30-JUN-2022
Pohnpeian	01-JAN-1951	30-JUN-2022
Trukese	01-JAN-1951	30-JUN-2022
Yapese	01-JAN-1951	30-JUN-2022

The end dated values will no longer be available for selection after the 30-JUN-2022, however the value will remain on records where it was entered prior to the end date.

Reporting

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