



ELECTRONIC STAFF RECORD

RN513 Guide to Enhancements and Changes Release 55.0.0.0 & 55.1.0.0

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 55.0.0.0 and 55.1.0.0. 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 a revised 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 Changes to My Personal Information, and My Equality and Diversity Portlets

The My Personal Information and My Equality and Diversity portlets have both been updated (including help text) on the My ESR Dashboard to include an indicator as to when the last time any of the data for each portlet was updated:

My Equality and Diversity Portlet – Collapsed View

My Equality and Diversity

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○

You are approaching 12 months since you last updated or verified your details. Please update or verify your details to ensure they are up to date.

Last Updated/Verified: 1 September 2021

View Details
▼

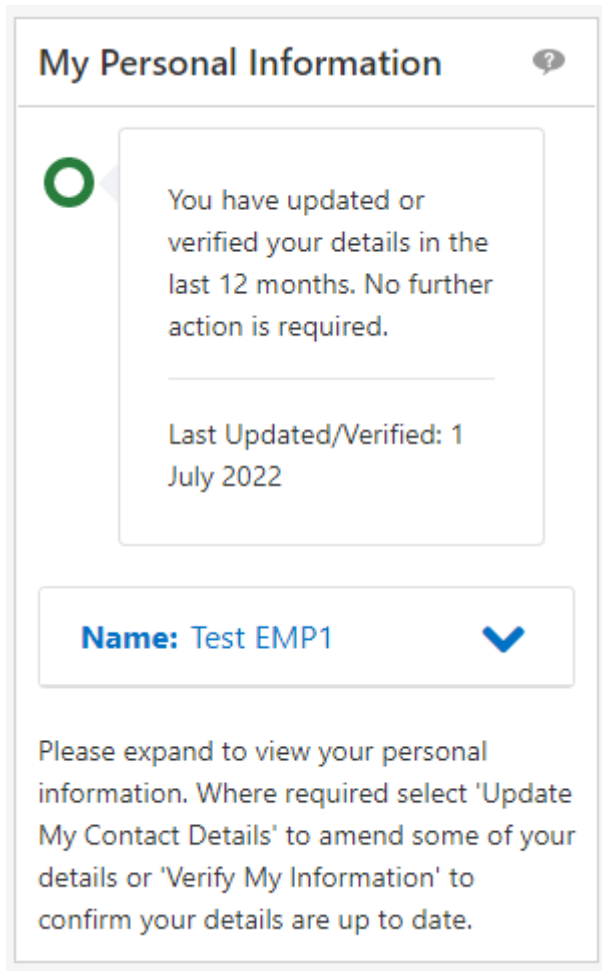
Please expand to view your details. Where required select 'Update My Information' to amend some of your details or 'Verify My Information' to confirm your details are up to date.

This Portlet shows your Equality and Diversity details. Click 'View Details' to show or hide this information.

Click 'Update My Information' to amend or 'Verify My Information' to confirm your details are up to date.

To amend your disability information in the event of any changes, please input the date your information changed in the Start Date field and update the Disability Category with the new detail. Your disability information portlet can hold up to 5 records with an Active status. To manage the record status, please navigate to the self-service forms.

My Personal Information Portlet – Collapsed View



This Portlet shows your Personal Information. Click your name to show or hide this information. Select 'Update My Contact Details' to amend or 'Verify My Details' to confirm your details are up to date.

Status Indicator

This displays the status colour, associated text, and date of last update/verification. It will change the status colour and associated text based on the date the user last updated or verified their information within each portlet.

The following rules apply:

- 1) The status colour will be 'Green' for up to 9 months (275 days) after the latest update or verification. The associated text that will be displayed along with the status colour is:

'You have updated or verified your details in the last 12 months. No further action is required.'

- 2) The status colour will be 'Amber' between 9 (276 days) and 12 (364 days) months after the latest update or verification. The associated text that will be displayed along with the status colour is:

'You are approaching 12 months since you last updated or verified your details. Please update or verify your details to ensure they are up to date.'

- 3) The status colour will be 'Red' from 12 months (365 days) or more after the latest update or verification. The associated text that will be displayed along with the status colour is:

'You have not updated or verified your information in the last 12 months. Please update or verify your details to ensure they are up to date.'

The 'Last Updated/Verified' field will be added to both portlets and will display date in 'DD MM YYYY' format (for example, 10 March 2022).

- 4) The status colour will be 'Red' if the details have not been completed/verified as part of the recruitment process. The associated text that will be displayed along with the status colour is:

'You have not verified your details. Please update or verify your details to ensure they are up to date.'

Last Update/Verified – Go-Live Date

The 'Last Update/Verified' date for each portlet will be the date when any of the data items held within each of the portlets was last updated. For example, if a user's Address had been updated 01-JUL-2021 (My Personal Information portlet) then 01-JUL-2021 is the date that would be displayed as the 'Last Update/Verified'.

Where details have not been updated for some time, the records will be datafixed so that the notifications can be staggered over the first 12 months. For example, employees who have not updated their details since 15th August 2012 will have their last update datafixed to 15th August 2022, meaning that they will receive a notification on the 15th August 2023.

Verify My Information

A 'Verify My Information' button has been added to both portlets. Where this button is selected by the user, the portlets will be refreshed automatically to confirm that they have verified their details and the date will reset accordingly.

The date will also reset following an update made to any of the relevant data items for the user via Employee Self Service or a professional user/manager (including self-service URP's).

NOTE: Where update or verification action is performed as per above, the 'Last Updated/Verified' field will be updated to reflect the effective date of the action.

My Equality and Diversity Portlet – Expanded View

My Equality and Diversity

You have updated or verified your details in the last 12 months. No further action is required.

Last Updated/Verified: 6 July 2022

View Details

Ethnic Origin: A White - British
Country Of Birth: United Kingdom
Sexual Orientation: Heterosexual or Straight
Religious Belief: I do not wish to disclose my religion/belief
Marital Status: Single
Disability Details: [Click here](#) to view details

Update My Information

Verify My Information

My Personal Information Portlet – Expanded View

My Personal Information

You have updated or verified your details in the last 12 months. No further action is required.

Last Updated/Verified: 6 July 2022

Name: Test EMP1

Address: Warwick Technology Park, Gallows Hill, Warwick CV34 6NZ
Home: 01926 648833
Mobile: 07724 987512
Work: 01926 654287
Home Email: testemp@gmail.com
Email: testemp@hotmail.com
Contact: [v+](#)
Position: AA POS1

[Immunisations and Checks](#)

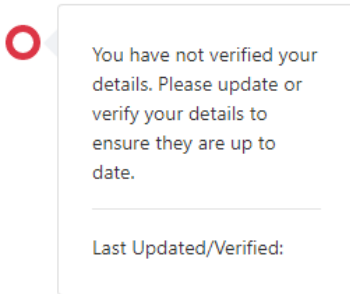
Update My Contact Details

Verify My Information

My Applicant Dashboard – My Applicant Details & My Equality and Diversity Portlets

As part of the on-boarding process, where an applicant has updated or confirmed their Personal Information/Equality and Diversity details then the date confirmed will be recorded as the last verified date and the respective portlets on the My ESR Dashboard will have a status of Green.

If an Applicant does not confirm or update their existing details', once they are hired the portlet will be Red and display as follows:



Direct Hires (Employee)

For direct hires where the relevant data items have been populated, the user will also have a 'Green' status once they access the My ESR Dashboard.

If the data items have not been populated, they will also receive the above and will need to verify their information.

New Workflow Notifications and E-mail

Two new notifications and e-mails will be triggered in ESR where the user has not updated or verified their equality and diversity, or personal information within the last 12 months (365 days).

Review Your Personal Details

Worklist >



Information

This notification does not require a response.

Review Your Personal Details

OK

Reassign

To: EMP1, Test
Sent: 05-Jul-2022 14:36:38
ID: 177585

Dear Test

The personal details held on your record in ESR has not been reviewed in the past 12 months.

You can review your information by logging into ESR and accessing the details held for you by 258 Previous Year Leavers via the My Personal Information Portlet.

You can either update the information held for you, or if it is correct, please press the Verify My Details button.

Thank you for your assistance.

Review Your Equality and Diversity Information

[Worklist >](#)



Information

This notification does not require a response.

Review Your Equality and Diversity Information

[OK](#)

[Reassign](#)

To: EMP1, Test
Sent: 05-Jul-2022 14:36:39
ID: 177588

Dear Test

The Equality and Diversity information held on your record in ESR has not been reviewed in the past 12 months.

You can review your information by logging into ESR and accessing the details held about you via the My Equality and Diversity Portlet.

If the information held about you is correct, please press the Verify My Details button, or else update your details as required.

Thank you for your assistance, please be assured that this information is confidential and cannot be viewed by your manager. Maintaining up to date information helps 258 Previous Year Leavers to demonstrate compliance with equality legislation and NHS policies and assists in determining whether action is necessary to improve the working experience for all NHS staff.

BI Reporting

The dates of updates and verifications will be stored in ESR but will not be available in BI for reporting purposes in release 55 and will be deployed in a future release. These will be detailed on the relevant GTE.

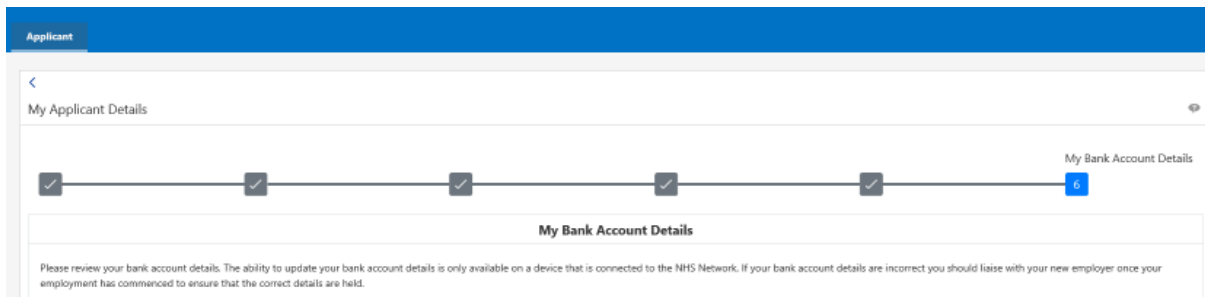
3 Changes to My Applicant Dashboard

Several changes have been made to the text found within the 'My Applicant Dashboard' as described below.

My Applicant Details Portlet

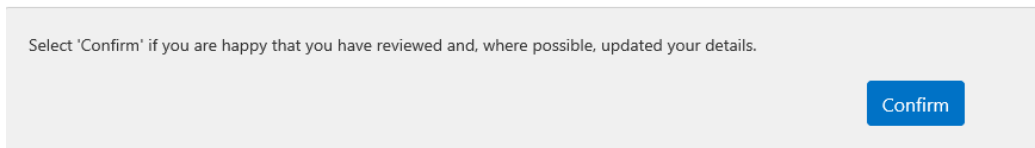
When logged in via the internet, the instructions on the 'My Bank Details' has been updated to:

“Please review your bank account details. The ability to update your bank account details is only available on a device that is connected to the NHS Network. If your bank account details are incorrect you should liaise with your new employer once your employment has commenced to ensure that the correct details are held.”



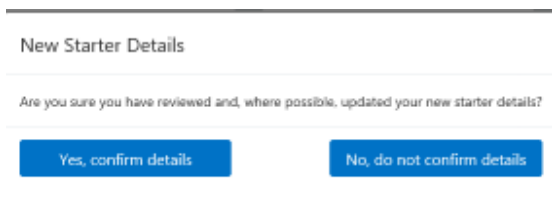
The 'Confirmation' text on the 'My Bank Details' tab within the 'My Applicant Details' Portlet has been updated to:

“Select 'Confirm' if you are happy that you have reviewed and, where possible, updated your details.”



The 'pop-up' help text following a confirmation on the 'My Bank Details' tab within the 'My Applicant Details' Portlet has been updated to:

“Are you sure you have reviewed and, where possible, updated your new starter details?”



My Applicant Checklist Portlet

The Action Name 'Bank Details Confirmed' has been updated to 'Bank Details Reviewed'.

My Applicant Checklist ?

Applicant Number : 2169 ↻

Action Items	Status	
e-Learning Completed	Completed	i
Checked Personal Information	In Progress	i
Pre-employment Checks	In Progress	i
Compliance and Competency	Not Started	i
Checked Equality and Diversity Details	Completed	i
Bank Details Reviewed	In Progress	i

My Equality and Diversity Portlet

The Help text has been updated to:

“This Portlet shows your Equality and Diversity details. Click ‘View Details’ to show or hide this information.

Click ‘Update My Information’ to amend your details. To amend your disability information in the event of any changes, please input the date your information changed in the Start Date field and update the Disability Category with the new detail. Your disability information portlet can hold up to 5 records with an Active status. To manage the record status, please navigate to the self-service forms.”

This Portlet shows your Equality and Diversity details. Click 'View Details' to show or hide this information.

Click 'Update My Information' to amend your details. To amend your disability information in the event of any changes, please input the date your information changed in the Start Date field and update the Disability Category with the new detail. Your disability information portlet can hold up to 5 records with an Active status. To manage the record status, please navigate to the self-service forms.

The instructions displayed after clicking 'Update My Information' have been updated to:

“Please review and update your details if necessary. Select the ‘Confirm’ button when completed. To amend your disability information in the event of any changes, please input the date your information changed in the Start Date field and update the Disability Category with the new detail. Your disability information portlet can hold up to 5 records with an Active status. To manage the record status, please navigate to the self-service forms.”

My Equality and Diversity

Please review and update your details if necessary. Select the 'Confirm' button when completed. To amend your disability information in the event of any changes, please input the date your information changed in the Start Date field and update the Disability Category with the new detail. Your disability information portlet can hold up to 5 records with an Active status. To manage the record status, please navigate to the self-service forms.

Employment Checklist Details

The segment name 'Bank Account Details Confirmed' found on the 'Employment Checklist Details' Person EIT, has been renamed to 'Bank Account Details Reviewed'

The screenshot shows a web application window titled 'Enter HR Extra Information (Lease01 - Mrs. Vidant)'. A modal dialog box titled 'Extra Person Information' is open, displaying a list of fields for data entry. The fields include:

- Date of Medical
- Date of Medical Clearance
- OH Status
- EPP Clearance
- Date of Prof Reg Check - Recruitment
- Date of Prof Reg Check - New Joiner
- Date of Qualifications Check
- Insolvency check
- Disqualified Directors Register Check
- Self-Declaration Form signed
- E-Rec Vacancy Ref
- Date Confirmed Personal Information
- Date Confirmed E&D Information
- IAT Consent
- Latest IAT Consent Update
- Bank Account Details Reviewed** (highlighted with a red box) containing the value **01-SEP-2022**

At the bottom of the dialog box, there are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

4 Increase to Annual Leave Entitlement for Welsh Organisations

Further to Pay Letter AfC, M&D & ESP (W) 01/2021, the annual leave accrual plans for non-AfC pay grades in Wales are to be increased by 1 day with effect from 1st April 2022.

5 ESRBI – New Registration/Membership Body Reporting

A new folder structure has been created under the following subject areas:

- Human Resources – Person EIT Details
- Human Resources – Applicant EIT Details

to enable organisations to report on the Registration/Membership type 'British Assoc for Behavioural and Cognitive Psychotherapies' which was implemented in Release 54.0.0.0.

6 End of the Transitional Period for Pay Progression for Welsh AfC Staff

The transitional period for Pay Progression for Welsh AfC staff is due to end and from 1st October 2022, all AfC staff are required to have a positive Pay Progression review outcome before a pay affecting increment can be awarded. This change ensures that pay affecting increments with an increment date on or after 01-Oct-2022 are not automatically granted unless the Pay Progression review outcome is set to 'Yes'.

Where the increment is not pay affecting, progression through the pay scale continues to be automatic.

All workflow notifications, increment report messages and BI reports are updated to reflect the change.

7 **HMRC Advisory Rates**

HMRC Advisory Fuel rates 01 Sep 2022

HMRC has published new advisory fuel rates for company cars effective 01 Sep 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	15p	*9p
1401cc to 2000cc	18p	*11p
Over 2000cc	27p	17p

Engine Size	Diesel
1600cc or less	14p
1601cc to 2000cc	17p
Over 2000cc	22p

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

* 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 will need to be made manually.

8 Update to Payslip Messages for Overpayments

The payslip messages presented to employees with Gross Overpayment elements has changed to remove any references to Loans. The messages will also update the term 'Amount Paid' to be 'Amount Repaid'.

This change will be effective from the release date and is not retrospective.

9 Revised Rates for Simply Health

New rates have been applied to ESR for Hospital Fund NHS with an effective date of 01-May-2022. The table below shows the new rates.

Element Name	Scheme	Deduction Type	Old Rate	New Rate	New Effective Date	Old Effective Date
Hospital Fund NHS	CYM	S/Health L1 + Ptner 2018 Rate M	297.60	303.60	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L1 + Ptner 2018 Rate W	297.44	303.68	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L1 2018 Rate M	161.16	164.40	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L1 2018 Rate W	161.20	164.32	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L2 + Ptner 2018 Rate M	352.68	359.76	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L2 + Ptner 2018 Rate W	353.60	360.36	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L2 2018 Rate M	210.12	214.32	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L2 2018 Rate W	210.60	214.76	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L3 + Ptner 2018 Rate M	458.16	467.28	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L3 + Ptner 2018 Rate W	458.64	468.00	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L3 2018 Rate M	259.80	264.96	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L3 2018 Rate W	260.00	265.20	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L4 + Ptner 2018 Rate M	619.92	632.40	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L4 + Ptner 2018 Rate W	619.84	632.84	01/05/2022	01-May-18

Hospital Fund NHS	CYM	S/Health L4 2018 Rate M	328.56	335.16	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L4 2018 Rate W	328.64	335.40	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L5 + Ptner 2018 Rate M	880.32	897.96	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L5 + Ptner 2018 Rate W	880.88	898.56	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L5 2018 Rate M	526.92	537.48	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/Health L5 2018 Rate W	527.28	537.68	01/05/2022	01-May-18
Hospital Fund NHS	CYM	S/health Rate 1 M	148.68	151.68	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 1 W	148.72	151.84	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 11 M	892.32	910.08	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 11 W	892.32	910.00	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 13 M	1189.44	1213.20	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 13 W	1189.76	1213.68	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 2 M	223.08	227.52	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 2 W	223.08	227.24	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 3 M	297.36	303.36	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 3 W	297.44	303.16	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 5 M	446.16	455.04	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 5 W	446.16	455.00	01/05/2022	01-Apr-16

Hospital Fund NHS	CYM	S/health Rate 7 M	594.72	606.60	01/05/2022	01-Apr-16
Hospital Fund NHS	CYM	S/health Rate 7 W	594.88	606.84	01/05/2022	01-Apr-16

Element Name	Scheme	Meaning	Old Rate	New Rate	New Effective Date	Old Effective Date
Hospital Fund NHS	NHS	S/Health L1 + Ptner 2018 Rate M	297.60	303.60	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L1 + Ptner 2018 Rate W	297.44	303.68	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L1 2018 Rate M	161.16	164.40	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L1 2018 Rate W	161.20	164.32	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L2 + Ptner 2018 Rate M	352.68	359.76	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L2 + Ptner 2018 Rate W	353.60	360.36	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L2 2018 Rate M	210.12	214.32	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L2 2018 Rate W	210.60	214.76	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L3 + Ptner 2018 Rate M	458.16	467.28	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L3 + Ptner 2018 Rate W	458.64	468.00	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L3 2018 Rate M	259.80	264.96	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L3 2018 Rate W	260.00	265.20	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L4 + Ptner 2018 Rate M	619.92	632.40	01/05/2022	01-May-18

Hospital Fund NHS	NHS	S/Health L4 + Ptner 2018 Rate W	619.84	632.84	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L4 2018 Rate M	328.56	335.16	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L4 2018 Rate W	328.64	335.40	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L5 + Ptner 2018 Rate M	880.32	897.96	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L5 + Ptner 2018 Rate W	880.88	898.56	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L5 2018 Rate M	526.92	537.48	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/Health L5 2018 Rate W	527.28	537.68	01/05/2022	01-May-18
Hospital Fund NHS	NHS	S/health Rate 1 M	148.68	151.68	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 1 W	148.72	151.84	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 11 M	892.32	910.08	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 11 W	892.32	910.00	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 13 M	1189.44	1213.20	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 13 W	1189.76	1213.68	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 2 M	223.08	227.52	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 2 W	223.08	227.24	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 3 M	297.36	303.36	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 3 W	297.44	303.16	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 5 M	446.16	455.04	01/05/2022	01-Apr-16

Hospital Fund NHS	NHS	S/health Rate 5 W	446.16	455.00	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 7 M	594.72	606.60	01/05/2022	01-Apr-16
Hospital Fund NHS	NHS	S/health Rate 7 W	594.88	606.84	01/05/2022	01-Apr-16

10 Changes to the NHS Pension Scheme Contributions

With effect from 1st October 2022, the way that pension contributions are calculated for members of the NHS Pension Scheme is changing, following the outcome of the McCloud case.

- Contributions are to be calculated on actual pensionable earnings instead of WTE
- There is an increase in the number of banding tiers from 6 to 11
- Tiers will be amended in line with AfC Pay Awards
- The change applies to employee contributions only, there are no changes being made to the calculation or rate that applies to Employer contributions

Pension Band Tiers

From 1st October 2022, there will be 11 bands and the rates will be as follows:

Pension Band	Pensionable Pay Upper limit	Employee's Contribution	Employer's Contribution
A	£13,246.99	5.1%	14.38%
B	£16,831.99	5.7%	14.38%
C	£22,878.99	6.1%	14.38%
D	£23,948.99	6.8%	14.38%
E	£28,223.99	7.7%	14.38%
F	£29,179.99	8.8%	14.38%
G	£43,805.99	9.8%	14.38%
H	£49,245.99	10.0%	14.38%
I	£56,163.99	11.6%	14.38%
J	£72,030.99	12.5%	14.38%
K	£9999999.99	13.5%	14.38%

Calculations

All system calculations to determine the Pension Band to be applied, will now be done on annualised Actual pensionable pay.

Mid-Year Reassessment process

To take into account that the Pension Band will be determined on annualised actual pensionable pay, instead of WTE, the Mid-Year Reassessment process is to be enhanced to assess permanent changes to contracted hours.

NOTE: Permanent changes in shift patterns cannot be assessed as ESR does not hold roster information.

NHS Pension Band Allocation report

The NHS Pension Band Allocation report will be amended with the following:

Removal of columns:

- Average FTE
- Annualised Hours
- NR Pensionable Pay
- Recurring Hours Worked
- Annualised WTE Pan Pay

Additional columns added:

- Date latest pay affecting change made
- Effective Date of latest pay affecting change

In addition, 4 new messages will be added to the Year End process:

- Assignment has had a mid-period change and change was actioned in a later pay period than the effective date, please check
- Assignment skipped due to pay affecting change effective after first day of last pay period in year
- Negative pay period identified in calculation, please check allocated banding is correct
- Pay affecting change applied after Pay Award effective date - please check banding allocated is correct

Pension Rebanding

Following the above updates to the system that will be applied over the Release 55.0.0.0 weekend, the Pension Rebanding process will commence. As for the Year End process, this will be run in 2 phases, details of timings will be provided in a separate User Notice.

The process to be run will assess all employees (substantive and bank) who are members of the NHS Pensions scheme on the 30th September 2022. All assignments will be assessed regardless of any mid-year assessments that have been undertaken through the year.

The process will calculate the annualised actual pensionable pay to determine the Pension Band to be applied.

- Pay will be assessed on the most recent permanent change in pay
- In most cases this will be from the effective date of the Pay Award
- If there is a later change in year, the effective date of change will be used, for example, increment 1st July

The assessment process will use the date of change information from the Mid-Year Reassessment process to determine the effective date of change. Where a record has not been assessed by the Mid-Year process, then information will be taken from the Year End Reassessment process that was done in April this year.

Note: If the Mid-Year Reassessment process has not been used and there have been changes since the Year End Reassessment, there is a possibility that an incorrect Pension Band may be allocated.

The process will calculate any mid-year changes to salary (grade step or change in hours) as follows:

Where there has been a pay affecting change to the assignment then the annualised pensionable pay will be calculated by taking the pensionable pay since the effective date of change and multiplying by the appropriate number of periods, to get an annual figure.

- 1) Where the effective date of the change is on the 1st of the month, then that period will be included in the pensionable pay calculation.
- 2) Where the effective date is after the 1st of the month, the pensionable pay periods will be taken from the period immediately following the effective date of change.

Example 1

Pay Award 1st April 2022, no other change

Actual pensionable pay from 1st April to 30th September divided by 6 then multiplied by 12

For example, Actual Pensionable pay April to Sept = £20,000 / 6 * 12 = £40,000

Example 2

Change of hours from F/T to 30 hours per week 15th July 2022

Actual P/T pensionable pay from 1st August to 30th September divided by 2 then multiplied by 12

For example, Actual Pensionable pay £2,000 (F/T £2,500) / 2 * 12 = £12,000

Bank Staff

- Only active members of the NHS Pension Scheme will be assessed
- If no earnings since April 2022, record will be skipped

Records that will be assessed but need to be checked

- Mid-period change actioned in a later pay period than the effective date
- In the pay periods assessed, a period with negative net pay identified

Records that will not be assessed and will need to be reviewed/adjusted manually

- Pay affecting change with an effective date after 1st September 2022
- Negative or no YTD pensionable pay at the 30th September 2022
- Any assignment with the Pension Reband Override NHS element

Backdated Changes

Following the changes being applied in Release 55.0.0.0, it will not be possible for the Mid-Year reassessment process to assess any backdated changes that relate to prior to the 1st October 2022, but actioned in October payrolls onwards. The records will be processed but not updated and will produce an error on the output file and report. It is advisable that the process is still run to report the affected assignments so that they can be manually assessed and amended as required in the system.

NOTE: It is the responsibility of the organisation to ensure that assignments are paying the correct rate of pension contribution. It is therefore essential any changes made by the 1st October process, Year End process or ongoing Mid-Year Reassessment processes are checked and manually amended where required.