



# ELECTRONIC STAFF RECORD

RN548 Guide to Enhancements and Changes  
Release 58.3.0.0

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# 1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 58.3.0.0. 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 Update to Supplementary Roles

Following discussions with NHS Employers, the 'Armed Forces Reservist – High Readiness' Supplementary Role has been closed in ESR. Where employees have previously had this Supplementary Role recorded against their record, they should be advised to select the 'Armed Forces Reservist' value.

**NOTE:** If the 'Armed Forces Reservist – High Readiness' role is held against a Person record (in XXX HR Administration), it will be end dated.

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### **3 Update to List of Conflict of Interest Decision Makers**

The following Job Roles which were implemented as part of the National Workforce Data Set 3.3 uplift have been added as Conflict of Interest Decision Makers:

- Administrative and Clerical|Chief Information Officer
- Administrative and Clerical|Chief Operating Officer
- Administrative and Clerical|Chief People Officer
- Administrative and Clerical|Chief Strategy Officer
- Administrative and Clerical|Chief Sustainability Officer
- Administrative and Clerical|Deputy Chief Executive
- Administrative and Clerical|Estates and Facilities Director
- Administrative and Clerical|Improvement Director

Consequently, employees within these roles will now automatically receive a notification prompting them to declare potential conflicts of interests or review existing ones where organisations choose to run the NHS Decision Maker Notification Process.

## **4 New National Subjective Codes**

The following values have been added to the Subjective Code list of values effective from 01-JAN-1951:

- NHS6157 Bank Facilities band 4
- NHS6158 Housekeeper Band 2
- NHS6159 Porter Band 2
- NHS6162 Bank Catering Band 3
- NHS6196 Bank Healthcare Science Unqualified
- NHS6163 Bank Assistant Psychologist Band 4
- NHS6164 Bank Trainee Psychologist Band 5
- NHS6165 Bank Psychologist Band 6
- NHS6166 Bank Psychologist Band 7
- NHS6167 Bank Psychologist Band 8a
- NHS6168 Bank Psychologist Band 8b
- NHS6169 Bank Psychologist Band 8c
- NHS6173 Bank Dietitian Band 7
- NHS6174 Bank Dietitian Band 6
- NHS6175 Bank Dietitian Band 5
- NHS6176 Bank Dietetic Assistant Band 4
- NHS6177 Bank Dietetic Assistant Band 3
- NHS6178 Bank Advanced Podiatrist Band 7
- NHS6179 Bank Podiatrist Band 6
- NHS6186 BANK Podiatrist - Band 5
- NHS6187 Bank Podiatry Assistant Band 4
- NHS6188 Bank Podiatry Assistant Band 3
- NHS6189 Bank Psychotherapists/Psychological Therapists Band 8b
- NHS6192 Bank Psychotherapists/Psychological Therapists Band 8a
- NHS6193 Bank Psychotherapists/Psychological Therapists Band 7
- NHS6194 Bank Psychotherapists/Psychological Therapists Band 6
- NHS6195 Bank Psychotherapists/Psychological Therapists Band 5
- NHS6999 Physicians Associates – Bank
- NHS6017 Bank Occupational Therapist Band 7

## 5 Business Group Automatically Populated by Default in Appraisal Templates

The following items can now only be created with the Business Group field populated with NHS Business Group by default:

- Appraisal Templates
- Questionnaires
- Competency Templates
- Objective Templates

The screenshot shows the 'Create Appraisal Template' form. The 'Business Group' field is highlighted with a green asterisk and is pre-populated with 'NHS Business Group'. Other fields include 'Template', 'Valid From' (28-May-2025), 'Valid To', 'Final-Rating Scale', and 'Description'. Buttons for 'Cancel', 'Save', and 'Apply' are visible in the top right corner.

Additionally in the associated searches, Business Group will be populated by default.

The screenshot shows the 'Manage Appraisal Templates' search interface. The 'Business Group' field is pre-populated with 'NHS Business Group'. Other search criteria include 'Name', 'Valid From', 'Valid To', 'Current Templates', 'In Use', 'Competency Template', 'Objective Template', and 'Appraisee Questionnaire'. 'Go' and 'Clear' buttons are at the bottom.

**NOTE:** Users can remove the default value in searches to allow them to find old templates that were created without a business group.

## 6 Restrict Change Reason Based on Enrolment Status

To improve data quality, when updating an Enrolment Status from the Learning pages the 'Change Reasons' displayed will now be restricted based on the Enrolment Status that has been selected.

### Navigation:

- XXX Learning Administration > Catalogue > Class > Enrolments > Update (pencil icon)
- XXX Learning Administration > Catalogue > Class > Enrolments > Update Enrolments
- XXX Learning Administration > Catalogue > Class > Enrolments > Click on the Enrolment Status hyperlink
- XXX Learning/Class Administration > Learner > Enrolments and Subscriptions > Update Enrolments
- XXX Learning Instructor > Instructor Home > Class (Enrolments tab) > Update Enrolments
- XXX ESS > My Learning > Learning > Enrolments > Unenrol

Table of Enrolment Statuses and the associated Change Reasons:

Change Reason	Confirmed	Completed	Course Cancelled	Did Not Attend	Withdrawn	Not Completed	Waitlisted
Application Rejected					Y		
Attended Part of Class - Did Not Gain a Competence						Y	
Attended Part of Class - Gained a Competence		Y					
Attended Class		Y					
Carers Leave				Y	Y		
Change in Enrolment Priority	Y						
Class Cancellation			Y				
Class Cancellation (Exceptional Circumstances)			Y				
Class Cancellation (Insufficient Numbers)			Y				
Class Cancellation (Major Incident - MAJAX)			Y				
Class Cancellation (Trainer Not Available)			Y				
Class Full							Y
Class Open for Enrolment	Y						
Compassionate Leave				Y	Y		
Court Appearance				Y	Y		
Domestic Emergency				Y	Y		
Facilitator Cancellation			Y				
Forgot				Y			
Initial Enrolment	Y						
Left Organisation					Y		
Magistrates Duty				Y	Y		
Medical Appointment				Y	Y		
Moved from Waitlist	Y						
Military Service				Y	Y		

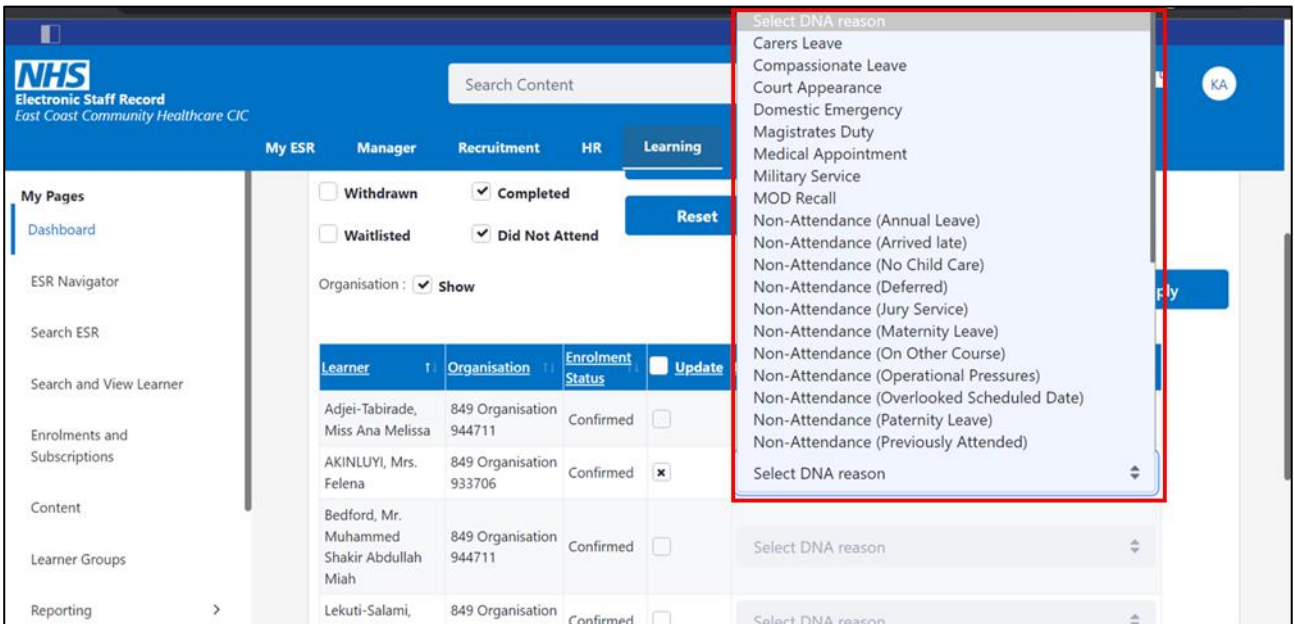
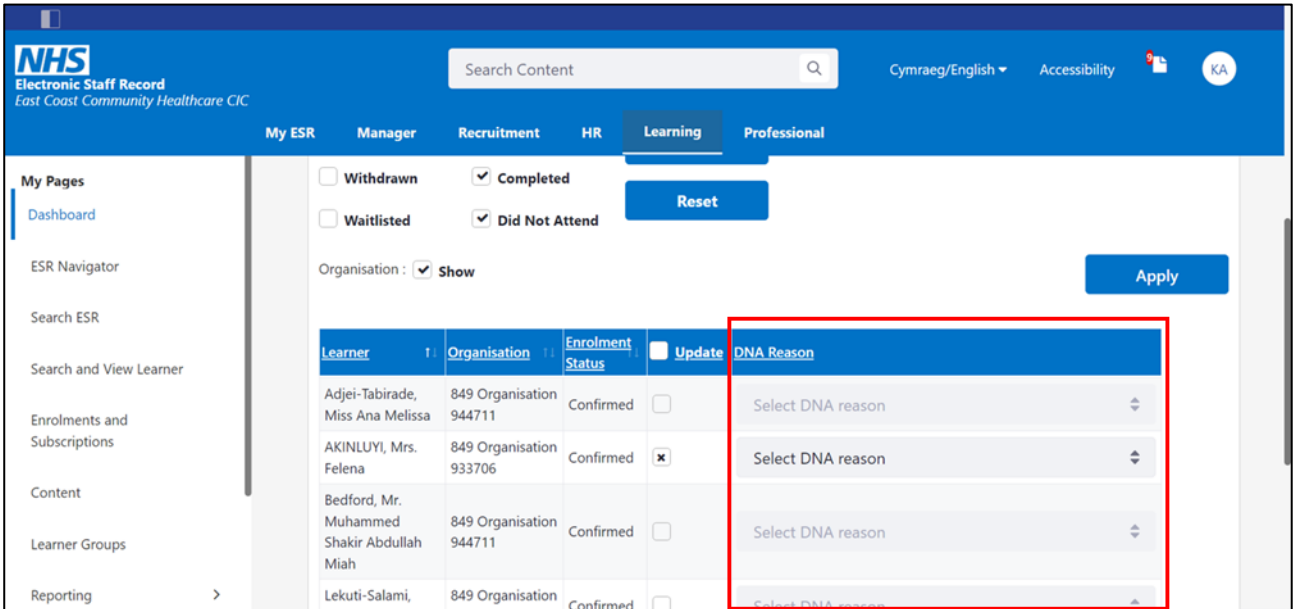


MOD Recall				Y	Y		
Non-Attendance (Annual Leave)				Y	Y		
Non-Attendance (Arrived late)				Y	Y		
Non-Attendance (Deferred)				Y	Y		
Non-Attendance (Incorrect Venue Attended)				Y			
Non-Attendance (Jury Service)				Y	Y		
Non-Attendance (Left Trust)					Y		
Non-Attendance (Maternity Leave)				Y	Y		
Non-Attendance (No Child Care)				Y	Y		
Non-Attendance (Not Informed to Attend)				Y			
Non-Attendance (On Other Course)				Y	Y		
Non-Attendance (Operational Pressures)				Y	Y		
Non-Attendance (Overlooked Scheduled Date)				Y	Y		
Non-Attendance (Paternity Leave)				Y	Y		
Non-Attendance (Personal Reasons)				Y	Y		
Non-Attendance (Previously Attended)				Y	Y		
Non-Attendance (Re-Schedule)				Y	Y		
Non-Attendance (Shift Conflict)				Y	Y		
Non-Attendance (Short Staffed)				Y	Y		
Non-Attendance (Sickness)				Y	Y		
Non-Attendance (Transport Problems)				Y	Y		
Non-Attendance (Weather Conditions)				Y	Y		
Non-Attendance (Work Commitments)				Y	Y		
Non-working Day				Y	Y		
Not Started Role				Y	Y		
Other Special Leave				Y	Y		
Study Leave				Y	Y		
Technical Issues				Y	Y		
Training Not Required				Y	Y		
Training Refused - Manager				Y	Y		
Unforeseen Circumstances				Y			
Unknown				Y			

\* Technical Issues is a new Change Reason applicable to 'Withdrawn' and 'Did Not Attend' Enrolment Statuses.

## 7 Recording of Did Not Attend (DNA) Reason in Update Attendance Portlet

When updating the enrolment status to Did Not Attend in the Update Attendance Portal, administrators can now also update the Reason for Non-Attendance.



The screenshot shows the NHS Electronic Staff Record interface. At the top, there is a search bar and navigation tabs for 'My ESR', 'Manager', 'Recruitment', 'HR', 'Learning', and 'Professional'. The 'Learning' tab is active. Below the navigation, there are filter options: 'Withdrawn' (unchecked), 'Completed' (checked), 'Waitlisted' (unchecked), and 'Did Not Attend' (checked). A 'Reset' button is present. The 'Organisation' filter is set to 'Show'. An 'Apply' button is located to the right of the filters. Below the filters is a table with the following columns: 'Learner', 'Organisation', 'Enrolment Status', 'Update', and 'DNA Reason'. The table contains four rows of data. The second row, for 'AKINLUYI, Mrs. Felena', is highlighted with a red border. In this row, the 'Update' checkbox is checked, and the 'DNA Reason' dropdown menu is open, showing 'Non-Attendance (Annual Leave)'. The other rows have 'Update' checkboxes that are unchecked and 'DNA Reason' dropdowns set to 'Select DNA reason'.

Learner	Organisation	Enrolment Status	Update	DNA Reason
Adjei-Tabirade, Miss Ana Melissa	849 Organisation 944711	Confirmed	<input type="checkbox"/>	Select DNA reason
AKINLUYI, Mrs. Felena	849 Organisation 933706	Confirmed	<input checked="" type="checkbox"/>	Non-Attendance (Annual Leave)
Bedford, Mr. Muhammed Shakir Abdullah Miah	849 Organisation 944711	Confirmed	<input type="checkbox"/>	Select DNA reason
Lekuti-Salami,	849 Organisation	Confirmed	<input type="checkbox"/>	Select DNA reason

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## **8 Update to Employment Checklist Details EIT**

Changes have been made to the Employment Checklist Details EIT to reorganise several existing attributes to improve the logical navigation for users. Additionally, attributes which have become redundant over time have now been removed from the EIT.

The following attributes have been moved from the Employment Checklist Details EIT to the Fit and Proper Person Test EIT enabling fit and proper person test data to be recorded more efficiently:

- Insolvency Check
- Disqualified Dir Check
- Self-Declaration Form Signed

These changes will be reflected in ESR BI so that all relevant attributes will be selectable from the EIT Fit and Proper Person Test folder.

The attributes listed below have been removed from the Employment Checklist Details EIT. For convenience they are still presented as part of Employment Checklist Details EIT within ESR BI.

- Date Confirmed Personal Information
- Date Confirmed E&D Information
- Bank Account Details Reviewed (presented in ESR BI as Bank Account Details Confirmed)

## **9 New Visa Types included in Employment Checklist Details EIT**

The Visa Type LoV on the Employment Checklist Details EIT has be expanded to include the following three entries:

- Graduate
- Health and Care Worker
- British National (Overseas)

## 10 HMRC Advisory Fuel Rates

### HMRC Advisory Fuel rates 01 September 2023

HMRC has published new advisory fuel rates for company cars effective 01 September 2023 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	*13p	*10p
1401cc to 2000cc	16p	*12p
Over 2000cc	25p	19p

Engine Size	Diesel
1600cc or less	*12p
1601cc to 2000cc	*14p
Over 2000cc	19p

Engine Size	Electric
1400cc or less	10p
Over 1400cc	10p

\* 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.