



ELECTRONIC STAFF RECORD

RN562 Guide to Enhancements and Changes
Release 60.2.0.0

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1 **Introduction**

The purpose of this document is to provide details of the enhancements to the ESR system in Release 60.2.0.0. 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 P11D Changes for 2023/24

The following functional changes have been made to ESR to cater for the P11D 2023/24 legislative updates:

1. All Working Sheets have been modified to reflect the new Tax year 2023-24
2. For 2023-24, the Number of Days in the Year changed to 366, as 2024 is a leap year.
3. Multiplier used in calculating the fuel benefit has increased from £25,300 to £27,800, whereas the basic calculation method remains unchanged.
4. Multiplier used in calculating the van fuel benefit has increased from £688 to £757, whereas the basic calculation method remains unchanged.
5. The cash equivalent value used to calculate the benefit for a van which is available for private use has increased from £3,600 to £3,960.
6. The official rate of interest changed from 2.00 to 2.25%.
7. In addition, special rules cover cars where the unrounded CO2 emissions figure does not exceed 75.
8. HMRC has published tables to select the appropriate percentage for using in the car benefit calculation, based on CO2 emissions.
9. Fuel Types accepted by HMRC are A, D, and F. The 9 different Fuel Types are reported under the Fuel Types A, D and F (from April 2019).
 - Fuel Type B, C, G, H, P and E will be reported as Fuel Type A.
 - Type L & D will be reported as Fuel Type D.
 - Type F will be reported as Fuel Type F.
10. The format of the P11D and the accompanying worksheets have been updated in line with the requirements for 2023-24. The P11D template now reflects that this is an employee copy, and no longer accepted by HMRC in paper format. Working Sheets 2 and 2b are now different to the draft versions issued by HMRC – the form now reflects a single table that is used for selecting the relevant percentage for cars and is not based on Date Registered.
11. From the tax year 2023-24, minimum value for the List Price of Car has been reduced from £1000.00 to £1.00.

3 TYE 2023/24 – Disabled Requests

In line with HMRC's guidance the following requests have been disabled as they are no longer valid for submission to HMRC:

- NHS RTI FPS XML Process 2023/24
- NHS P46(Car) Archive Process 2023/24
- NHS RTI EPS XML Process 2017/18
- NHS RTI EYU XML Process 2017/18

4 Enable On-line P11D

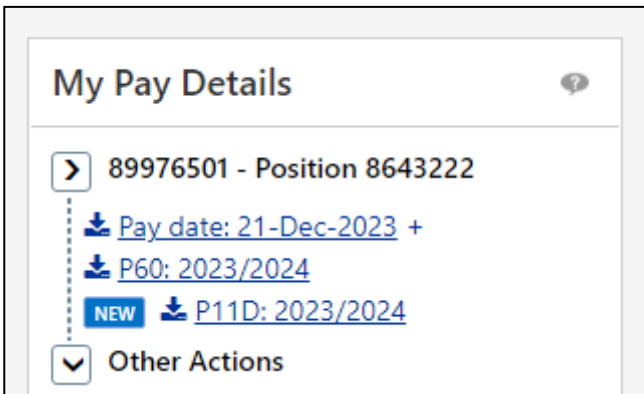
As part of this release employees will be given access to an online version of the P11D report. This will give them a full suite of payroll outputs that they can access anytime. It will also reduce the workloads for Payroll Teams in printing and distributing P11d reports to employees.

This will be made available in the following URPs:

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

Portal Changes

The 'My Payslip and P60' portlet is being renamed 'My Pay Details' and will include access to the latest P11D if available.



The user will be able to download a PDF version of the P11D file locally and save this or print it, as required by clicking on the P11D link. The name of the P11D PDF document will contain the Tax Year From and To and the assignment number for the employee in the following format:

P11D 2023-2024 12345678-2.pdf

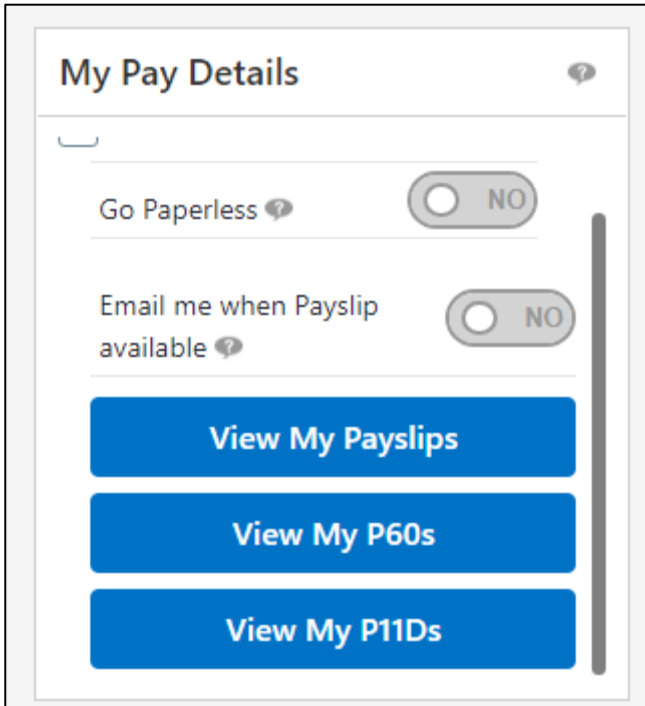
This is the P11D for assignment 12345678-2 for the tax year 2023-2024.

Other Actions

A new section has been added to the Portlet, 'Other Actions'

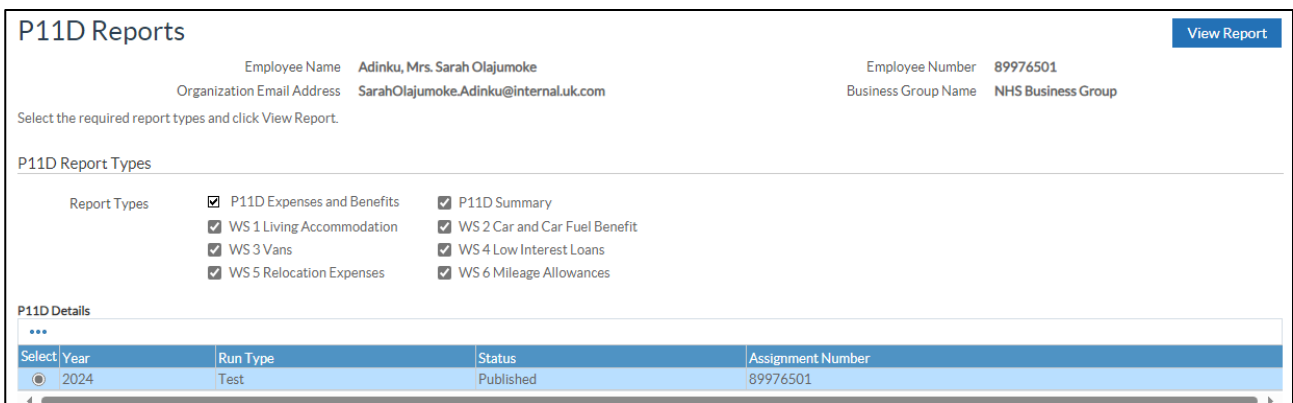
Clicking this will give access to:

- Option to Go Paperless
- Option to receive an email when the latest Payslip is available
- Option to view Payslips, P60s and P11Ds not available directly from the Portlet



NOTE: If the assignment does not have any P11Ds to view, the button to view P11D will not be available to select.

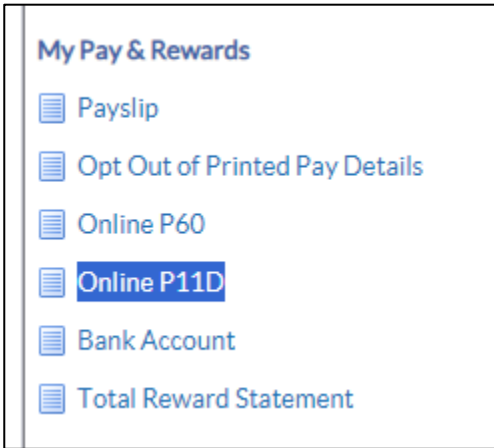
When users click on the View My P11D button they will see the SSHR P11D Reports, where they have additional options available to them.



The user will have the option to select the file they require and to deselect report types which are not relevant to them. Clicking **View Report** will open the pdf version of the P11D which can then be saved or printed locally.

In the Employee Self Service and Employee Self Service (Limited Access) menus:

- Online P11D be placed below the existing option for Online P60.
- Opt Out of Printed Payslip/P60 will be renamed Opt Out of Printed Pay Details

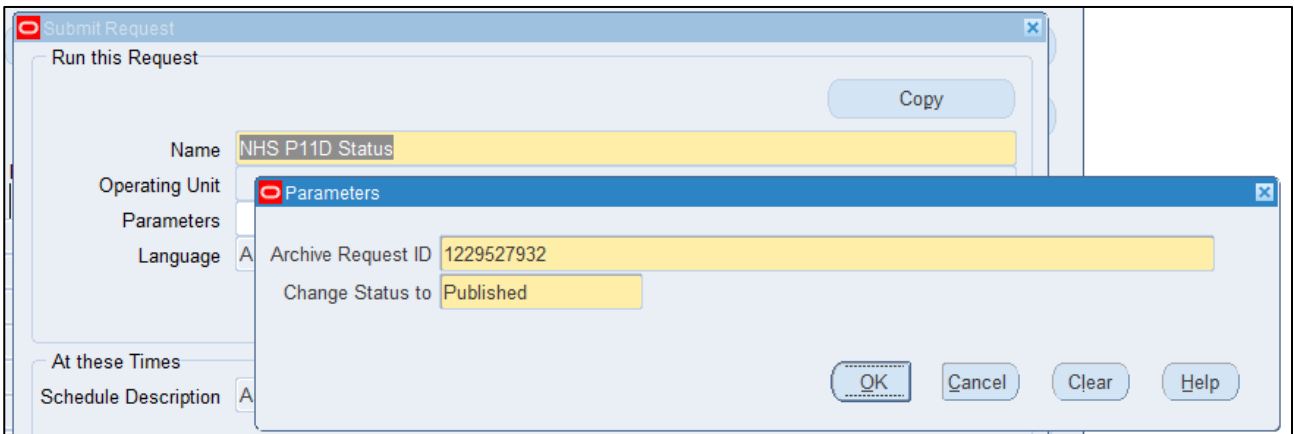


Payroll Changes

Payroll will need to run the new 'NHS P11D Status' process to make the P11Ds for a particular archive available for users to view in Self Service. This has been added to the following responsibilities:

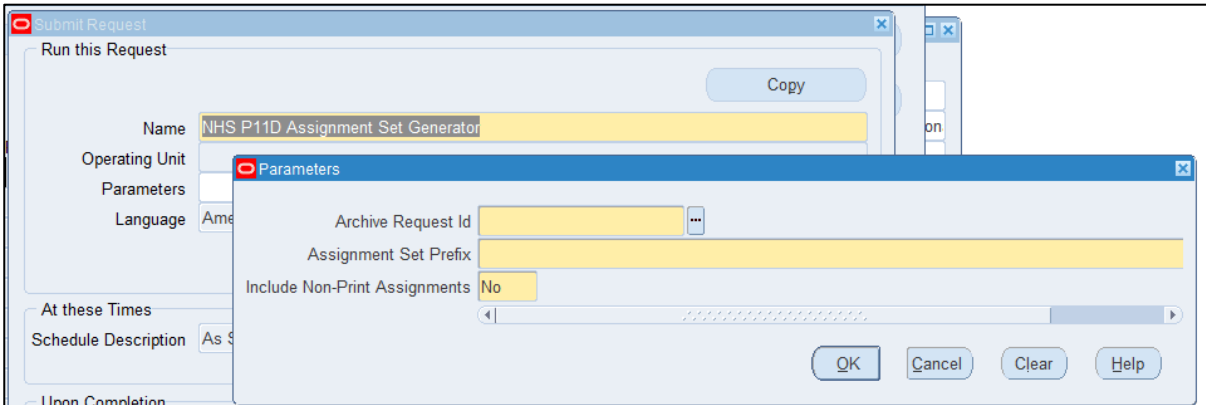
- XXX Payroll Administration
- XXX Payroll Super Administration

The status will need to be updated to Published for users to view their P11D details.



When producing a P11D Assignment Set using the NHS P11D Assignment Set Generator process, there is now a new option to include or exclude the people who have opted out of Printed Pay Details.

The new parameter is named 'Include Non-Print Assignments' and will accept a 'Yes' or 'No' value.



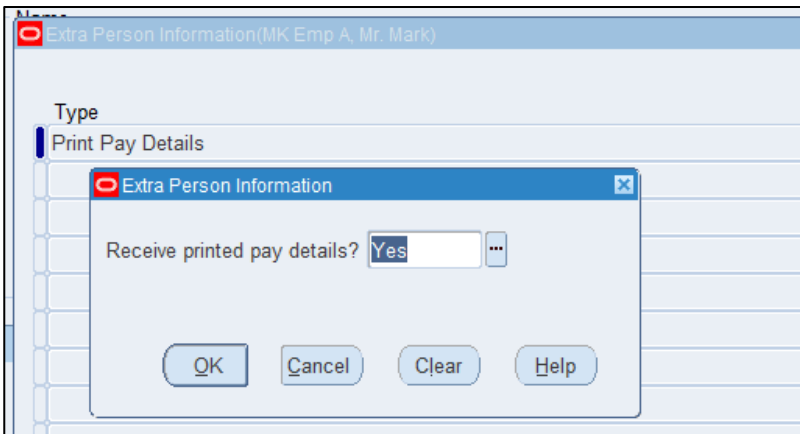
The default will be 'No', which means only assignments from the archive that are also opted in for printing are included in the assignment set.

Set this to value to 'Yes' to include All Assignments from the selected archive in the assignment set, regardless of their printing options.

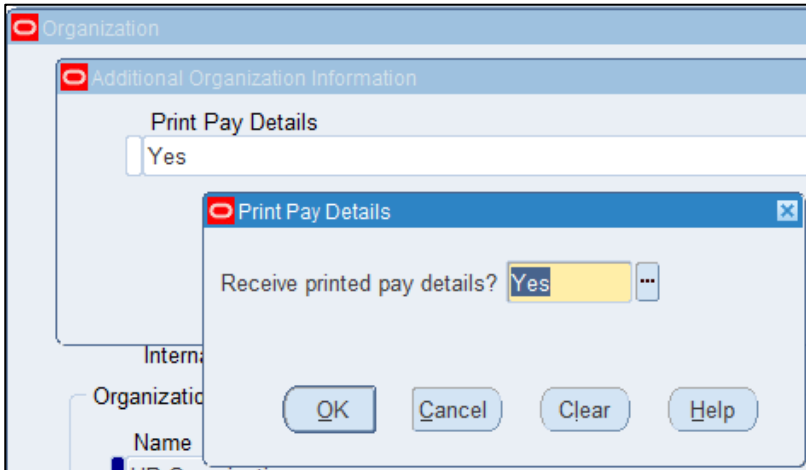
Changes to Print Options

The 'Print Payslip and P60' EITs will be renamed to 'Print Pay Details' and will now also control whether a paper version of the P11D is produced.

Person Extra Information Type:



Additional Organisation Information:



5 Flexible Working Changes

Following the enactment of the Employee Relations Act 2023, several changes have been jointly agreed between NHS England, NHS Employers and NHS Staff Council to support the changes to legislation.

Employee Request Changes

Employees are no longer required to set out a ‘business case’ in support of their request to explain what effect the change would have on the employer and how that might be dealt with.

To reflect this, two of the existing free text fields have been removed as follows:

- Impact of the new working pattern
- Accommodating the new working pattern

A new field has been introduced named:

- Relevant Supporting Information if you would like to provide it

The field is free text, allows up to 2000 characters and is not mandatory for entry.

NOTE: The new field will be added into the flexible working tab of the Employee Relations Dashboard in BI for reporting purposes in a future release. The two original fields will remain in this reporting area to allow for historic reporting of these values.

Notification Changes

Employers must now make a decision within two months of the request, unless an extension to the time to respond has been mutually agreed. This is reduced from the current time limit of three months.

To reflect this, the wording of the ‘Confirmation of receipt of application for Flexible Working’ notification has

been updated.

The wording of the 'Flexible Working Decision Date Not Entered Notification' wording has also been updated as follows:

Title: Flexible Working Decision Date Not Entered for <employee first name last name>

Please note that a decision date has not been entered against the application for flexible working from <employee first name last name>.

Applications for flexible working require a response within 2 months of receipt, unless an extension to the time to respond has been mutually agreed.

Please ensure that the applicant has received a response, or you have an agreed an extension with them by <Decision Required By Date>, and update the record in ESR accordingly.

*Changed wording underlined.

NOTE: This will only affect new requests marked as received after this release, it will not affect the decision date for any Flexible Working Requests which were previously marked as received.

Changes to List of Values

Changes have been made to the Flexible Working > Type of Request list of values to align with the terminology used within section 35 of the AfC Handbook and other national Flexible Working guidance:

Current Value	New Value	Change
N/A	Contractual Homemaker	NEW
N/A	Agile/Hybrid Worker	NEW
N/A	Partial Retirement	NEW
N/A	Retire and Return	NEW
N/A	Step Down	NEW
N/A	Wind Down	NEW
Home Working	N/A	CLOSE
Phased Retirement	Flexible Retirement	RENAME
Term-time Working	Part-Year Working	RENAME

The values marked as RENAME have been data fixed, so existing requests that had the previous current value will now show the new value.

This value set in the Self Service page now looks like this:

Flexible Working Request

- * Date of Application 08-Apr-2024
- * Type of Request ▼
- * Describe your current working pattern
- * Requested Change
- Requested Arrangements
- * Future Work Pattern

Relevant Supporting Information if you would like to provide it

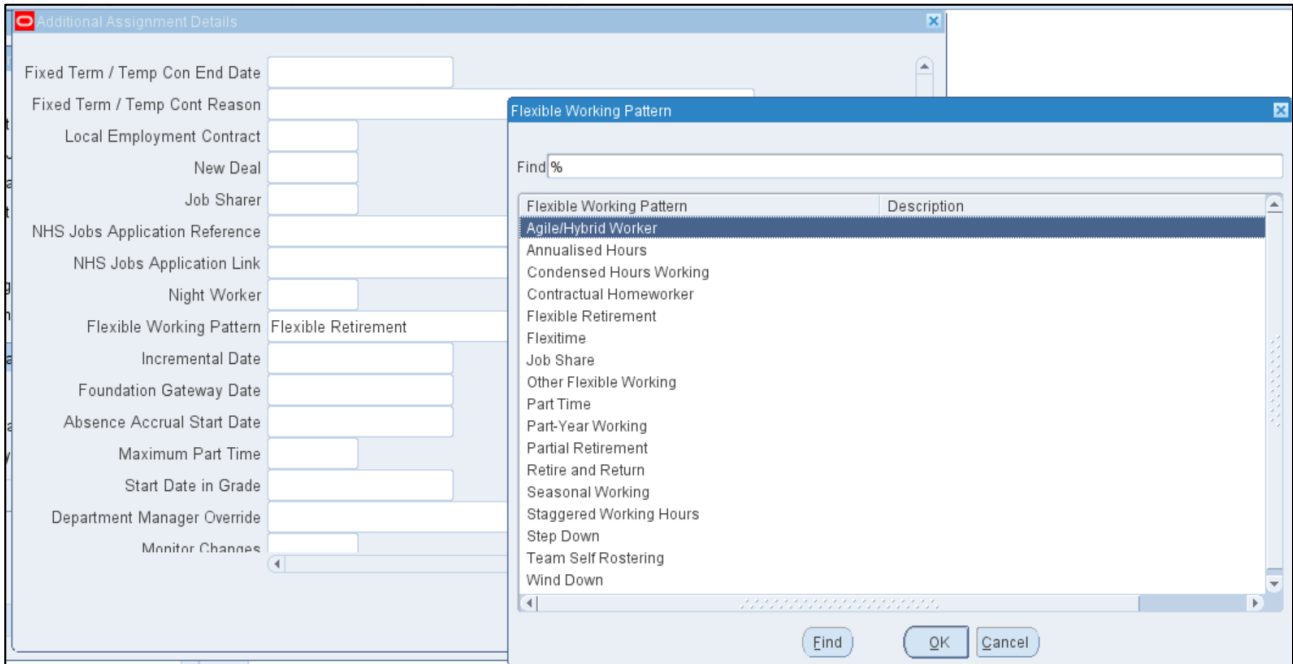
- * I would like this working pattern to commence from

- Agile/Hybrid Worker
- Annualised Hours
- Condensed Working Hours
- Contractual Homeworker ▼
- Flexible Retirement
- Flexitime
- Job Share
- Other Flexible Working
- Part Time
- Part-Year Working
- Partial Retirement
- Retire and Return
- Seasonal Working
- Staggered Working Hours
- Step Down
- Team Self Rostering
- Wind Down

As part of these changes, it has been jointly agreed that the list of Flexible Working Patterns held against the assignment DFF should align with the Flexible Work Types referenced above. The field and associated updated values enables organisations to record and therefore identify employees who have an agreed flexible working arrangement, including partial retirement.

Current Value	New Value	Change
Home Working (Contracted)	Contractual Homeworker	RENAME
Home Working (Occasional)	Agile/Hybrid Worker	RENAME
Term Time	Part-Year Working	RENAME
Vacation Working	Seasonal Working	RENAME
N/A	Flexitime	NEW
N/A	Part Time	NEW
N/A	Team Self Rostering	NEW
N/A	Job Share	NEW
N/A	Partial Retirement	NEW
N/A	Retire and Return	NEW
N/A	Step Down	NEW
N/A	Wind Down	NEW

The values marked as RENAME have also been data fixed, so existing assignment records that had the previous current value will now show the new value.



Both value sets now consist of identical values and will be aligned in future.

NOTE: There will be some scenarios where a Flexible Working Request has been submitted but not completed at the time of this release and the request was submitted using one of the following Working Patterns that are being removed or renamed:

- Home Working
- Phased Retirement
- Term-time Working

In this case the 'Type of Request' may then appear as blank in the Employee and Manager Flexible Working pages in Self Service. The manager can update this with a suitable alternative value when updating the request.

6 Update to Subjective Codes

The following new Subjective Code has been created in ESR:

- NHS6305 Pre Reg Pharmacy Technician Band 2
- NHS6405 Advanced Clinical Practitioner Band 8B
- NHS6306 Trust Funded Deanery FY1
- NHS6307 Trust Funded Deanery FY2
- NHS6308 Trust Funded Deanery Core Trainee
- NHS6309 Trust Funded Deanery Higher Trainee
- NHS6311 Trust Funded Deanery Dental Trainee
- NHS6312 Trust Funded LED FY1
- NHS6313 Trust Funded LED FY2
- NHS6314 Trust Funded LED Core Trainee
- NHS6315 Trust Funded LED Higher Trainee

7 Correction to Level 2 Sickness Reasons

This Release includes spelling corrections to level 2 sickness reasons.

The following values have been changed:

Old Value	New Value
S12003 Cartilage disorder	S12003 Cartilage disorder
S19010 Hyperlipiaemia	S19010 Hyperlipidaemia
S19015 Myocarditis	S19015 Myocarditis
S21009 Otitis externia	S21009 Otitis externa

These changes are also reflected in ESR BI and the SDW.