



ELECTRONIC STAFF RECORD

RN570 Guide to Enhancements and Changes Release 61.3.0.0

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1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 61.3.0.0. The details are grouped in functionality order.

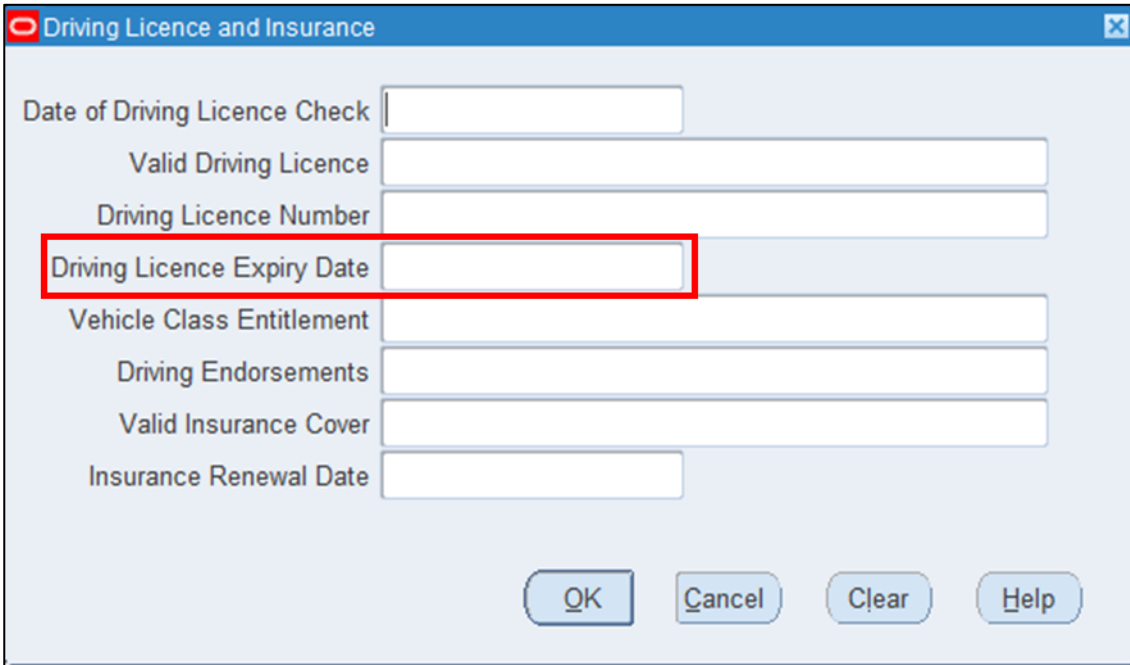
The changes to functionality outlined in this Release Notice are subject to successful testing. As is normal practice, any amendments to the content of the Release will be communicated in a revised Guide to Enhancement Notice.

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 New Driving Licence Expiry Date Field

A new field has been added within the Vehicle Registration form called "Driving Licence Expiry Date". The field has been introduced to ensure that where an employee requires a valid licence to perform their duties, organisations can monitor and manage this information ensuring their employees have a valid driving licence.

Navigation: Vehicle Registration > People > View Enter and Maintain > Licence and Insurance



The screenshot shows a software window titled "Driving Licence and Insurance". It contains several input fields: "Date of Driving Licence Check", "Valid Driving Licence", "Driving Licence Number", "Driving Licence Expiry Date", "Vehicle Class Entitlement", "Driving Endorsements", "Valid Insurance Cover", and "Insurance Renewal Date". The "Driving Licence Expiry Date" field is highlighted with a red rectangular border. At the bottom of the window are four buttons: "OK", "Cancel", "Clear", and "Help".

The Driving Licence Expiry Date field will also be available in the following folders within ESRBI for reporting purposes:

- Applicant SIT Details Subject Area > SIT NHS Driving Licence Information Folder
- Person SIT Details Subject Area > SIT NHS Driving Licence Information Folder
- Payroll Subject Area > SIT NHS Driving Licence Information Folder

3 New National Subjective Codes

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

- NHS6329 - DENTAL THERAPIST (STT) BAND 7
- NHS6332 - DENTAL THERAPIST (STT) BAND 6
- NHS6333 - DENTAL THERAPIST (STT) TRAINEE

4 Primary and Secondary Area of Work Added to BI

Primary and Secondary Area of Work are now available as data items in every ESR BI Subject Area where Area of Work is available as a data item. The Primary and Secondary Area of Work values are displayed so that they appear above the existing Area of Work data item, as below:

Primary Area of Work

Secondary Area of Work

Area of Work

The addition of these fields will help to provide greater contextual detail of Area of Work recording, therefore supporting organisations in identifying and addressing any data accuracy issues.

5 **Additional Measures and Flags in BI**

The following two measures have been added to ESRBI:

- Total FTE Start

The Total FTE Start measure works as per the existing Total FTE fact but returns figures at the start of any of the time dimension items (such as time.week or time.month) and works across a period returning multiple figures.

- Headcount Start

The Headcount Start measure works as per the existing Headcount fact but returns figures at the start of any of the time dimension items (such as time.week or time.month) and works across a period returning multiple figures.

A flag has been added to ESRBI to indicate where an employee has moved between Bank and Substantive post combinations as:

- Bank Only to Substantive Only
- Bank Only to Bank and Substantive
- Substantive Only to Bank Only
- Substantive Only to Bank and Substantive
- Bank and Substantive to Bank Only
- Bank and Substantive to Substantive Only

The new flag will be calculated in the ETL.

There are 4 scenarios that can possibly lead to the flag being required:

- Assignment is end dated
- New assignment created
- Assignment category date track updated
- Assignment category corrected

The new flag has also been included in the Data Warehouse so the turnover calculations can be updated there to match the BI calculations:

- Workforce Movement Subject Area
- Turnover Subject Area
- Workforce Composition Subject Area

These three all have the Wfc Workforce Movement Dim.

6 **Additional Registration Information for BABCP and BPS available in BI**

Two new fields were introduced in R60.0.0 to enable organisations to differentiate between the various professions that can be registered by the British Association for Behavioural and Cognitive Psychotherapies (BABCP) and the British Psychological Society (BPS).

Both '**BABCP Profession**' and '**BPS Profession**' are now available for reporting in ESR BI and can be found under the respective registration folders.

7 Third Party Element Report Available in Excel

A new concurrent program 'NHS Third Party Element Listing Report Excel' which produces the output in Excel format is available to the following URPs.

- XXX Payroll Administration
- XXX Payroll Super Administration
- XXX Payroll Audit
- XXX Finance Reporting
- XXX Finance Reporting and Hub Mapping

The 'NHS Third Party Element Listing Report Excel' retains the same parameters as the existing PDF version of the report except the "Sort By" and "Split By Third Party Payee" parameters which have been removed. The report produces the output with a default Sort Order by Organisation and offers the flexibility to sort the data in different ways to suit your business requirements without the need to run the report again.

The Excel version also outputs the same data as the existing PDF version of the report but with a few layout changes detailed below:

- The "Element Name" and "Element Input Value" data items have been moved from the header into the detail lines
- The Element totals are shown in a separate section at the top of the report

Example report where a single element is selected

The following totals will be shown at the top of the report followed by detailed lines:

- Organisation sub-total for each Third Party Payee
- Total for each Third-Party Payee
- Grand Total for the Selected Element

<u>NHS Third Party Element Listing Report</u>								
Report Date	17/07/2024 17:03							
Consolidation Set	ALL							
Payroll	ALL							
Element Grouping Name	Third Party Elements National							
Element	Court Order NTPP							
From Date	01-Jul-24							
To Date	31-Jul-24							
Third Party Payee	Issued By							
Extra Information								
<u>Summary of Pay Value by Third Party Payee and Organisation</u>								
Issued By	Organisation	Total Pay Value						
Oxfordshire Council	225 Organisation 1000351	445.86						
Total for Oxfordshire Council		445.86						
Warwick Dist Council	225 Organisation 1000351	1308.17						
Total for Warwick Dist		1308.17						
Grand Total		1754.03						
Organisation	NI Number	Employee Name	Assignment Number	Employee End Date	Period End Date	Pay Value	Element Name	Issued By
225 Organisation 1000351	TT343232D	VC, Miss Test EmplV	21001013		30-Jul-24	445.86	Court Order	Oxfordshire Council
225 Organisation 1000351	TT234341D	VC, Mrs. Test Empl	21001010		30-Jul-24	1308.17	Court Order	Warwick Dist
End of Report								

Example report where all elements (Element Name field is blank) are selected

The following totals will be shown at the top of the report followed by detailed lines:

- Organisation sub-total for each Element
- Total for each Element
- Grand Total for all Elements

NHS Third Party Element Listing Report									
Report Date	18/07/2024 05:48								
Consolidation Set	ALL								
Payroll	ALL								
Element Grouping Name	Third Party Elements National								
Element									
From Date	01-Jul-24								
To Date	31-Jul-24								
Third Party Payee									
Extra Information									
Summary of Pay Value by Element and Organisation									
Element Name	Organisation	Total Pay Value							
AMICUS	225 Organisation 1000351	500							
Total for AMICUS		500							
Court Order NTPP	225 Organisation 1000351	1754.03							
Total for Court Order NTPP		1754.03							
Pension EE NHS	225 Organisation 1000351	1666.11							
Pension EE NHS	225 Organisation 1008477	255.3							
Pension EE NHS	225 Organisation 917134	125.16							
Pension EE NHS	225 Organisation 926685	50.73							
Total for Pension EE NHS		2097.3							
UNISON	225 Organisation 1000351	100							
Total for UNISON		100							
Grand Total		4451.33							
Organisation	NI Number	Employee Name	Assignment Number	Employee End Date	Period End Date	Pay Value	Element Name	Element Input	Element Result
225 Organisation 1000351	TT239834C	VC, Mr. Test EmpV	21001014		30-Jul-24	500	AMICUS	Pay Value	
225 Organisation 1000351	TT343232D	VC, Miss Test EmpIV	21001013		30-Jul-24	445.86	Court Order	Issued By	Orfordshire Council
225 Organisation 1000351	TT234341D	VC, Mrs. Test EmplI	21001010		30-Jul-24	1308.17	Court Order	Issued By	Warwick Dist Council
225 Organisation 1000351	TT343232D	VC, Miss Test EmpIV	21001013		30-Jul-24	327.03	Pension EE NHS	Pay Value	
225 Organisation 1000351	TT239834C	VC, Mr. Test EmpV	21001014		30-Jul-24	282.41	Pension EE NHS	Pay Value	
225 Organisation 1000351	TT234341D	VC, Mrs. Test EmplI	21001010		30-Jul-24	575.07	Pension EE NHS	Pay Value	
225 Organisation 1000351	TT234356C	VC, Mrs. Test EmplII	21001011		30-Jul-24	481.6	Pension EE NHS	Pay Value	
225 Organisation 1000351	TT234356C	VC, Mrs. Test EmplIII	21001011		30-Jul-24	100	UNISON	Pay Value	
225 Organisation 1008477	TJ162247A	Adegbite-Almeida, Ms. An Hui	56337339		30-Jul-24	127.65	Pension EE NHS	Pay Value	
225 Organisation 1008477	TJ264018A	Adekunle Adeagbo-Sheikh, Miss Nadar	56748372		30-Jul-24	127.65	Pension EE NHS	Pay Value	
225 Organisation 917134	JJ613177B	Kuralarasu, Miss Enice	56149730		30-Jul-24	125.16	Pension EE NHS	Pay Value	
225 Organisation 926685	TK464562B	Boxer-Gyllenhaal, Miss Dilisha	56744857		30-Jul-24	50.73	Pension EE NHS	Pay Value	
End of Report									