ELECTRONIC STAFF RECORD

RN581 Guide to Enhancements and Changes Release 63.0.0.0

Information classification: PUBLIC

Revision Date: DECEMBER 2024

Contents

1 Introduction 3

ESR PORTAL

2 Add Pay Affecting Field to My Employment Portlet 4

SELF SERVICE

3 Record Employee Claims Using Self Service Interface 5

ESR

4 Annual Leave Balances to Include Buy/Sell A/L 20

5 Last Login Details..29

OLM

6 Generate Hyperlink for Subscriptions 30

7 Use the Reset Button to Change Selection of Classes in Learning Certification 31

PAY

8 Change to Occupational Paternity Pay..32

9 Pay Details Availability Notification 38

10 HMRC Advisory Fuel Rates for 01-DECEMBER-2024..41

1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 63.0.0.0. The details are grouped in functionality order.

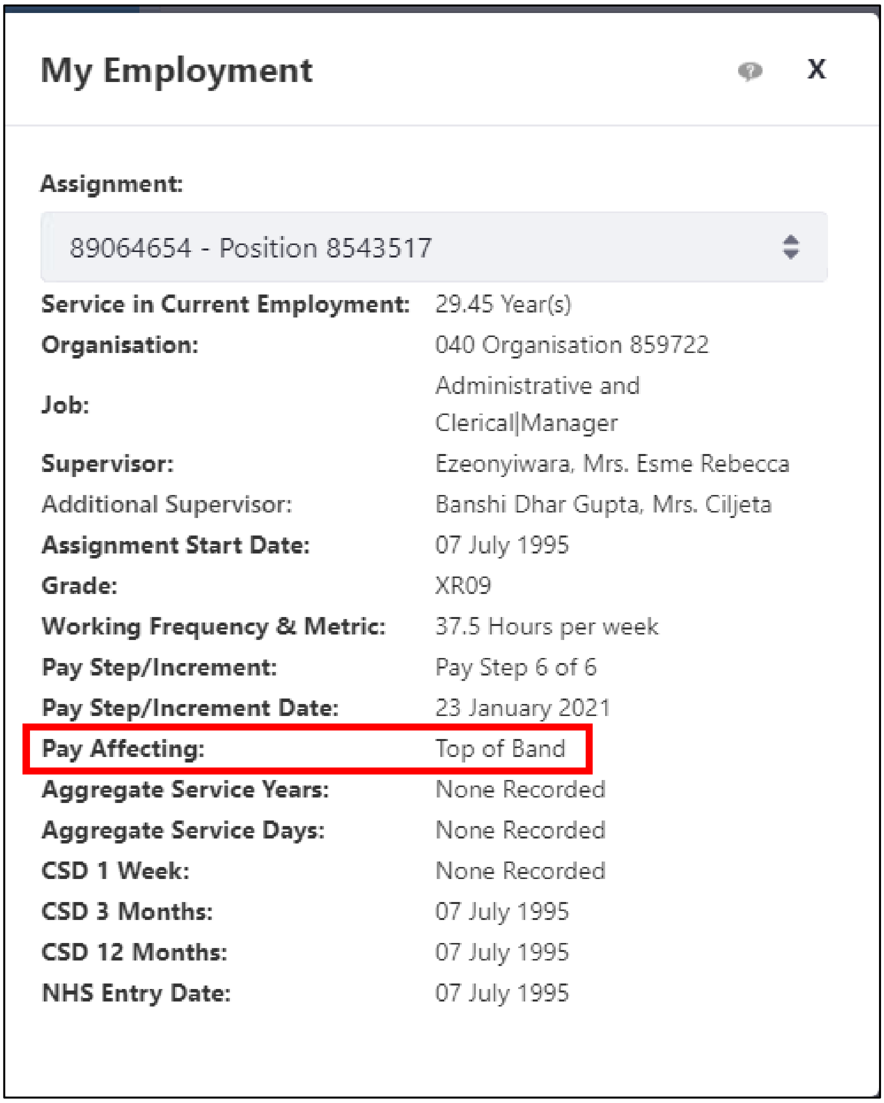
The changes to functionality outlined in this Release Notice are subject to successful testing. As is normal practice, any amendments to the content of the Release will be communicated in a revised Guide to Enhancement Notice.

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 Add Pay Affecting Field to My Employment Portlet

A new field called ‘Pay Affecting’ has been added to the ‘My Employment’ Portlet, below the ‘Pay Step/Increment Date’ field.

The 'Pay Affecting' field will display ‘Yes’, ‘No’ or ‘Top of Band’ depending on the current grade step, the number of steps available for the grade and the number of increments set for the selected assignment. Where appropriate values are not available the field will display ‘None Recorded’.



3 Record Employee Claims Using Self Service Interface

New functionality has been added into Employee Self Service to allow employees to initiate claims for additional non-recurring payments related to Expenses or Extra Duties.

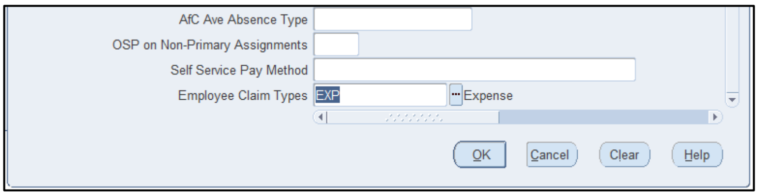
First the Organisation must decide whether they wish to enable this functionality for staff and if so for what groups of staff and which element they want staff to have access to.

Payroll DFF

A new item has been added on the Additional Payroll Details Descriptive Flexfield (DFF) for use by the Employee Claims Page. This will nominate whether the assignments in the payroll can make claims and controls which elements they have access to.

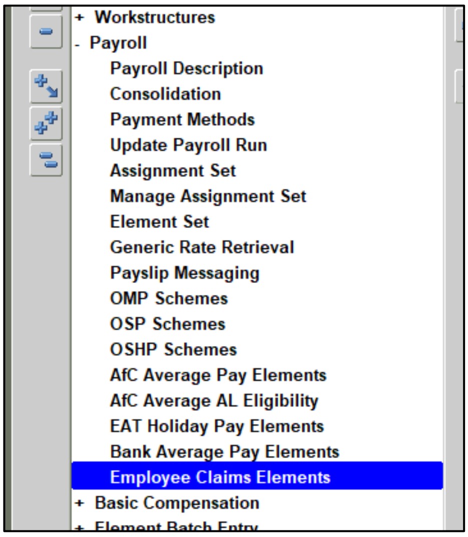
- <Null> No elements (Default)
- Expense Expense elements only
- Duty Duty elements only
- All All elements (as defined by the Employee Claims Elements page)

This payroll setting can be overridden for a particular assignment using the Employee Claims Enrolment element (see later). This defaults to ‘Payroll Default’ but can be overridden individually as required.



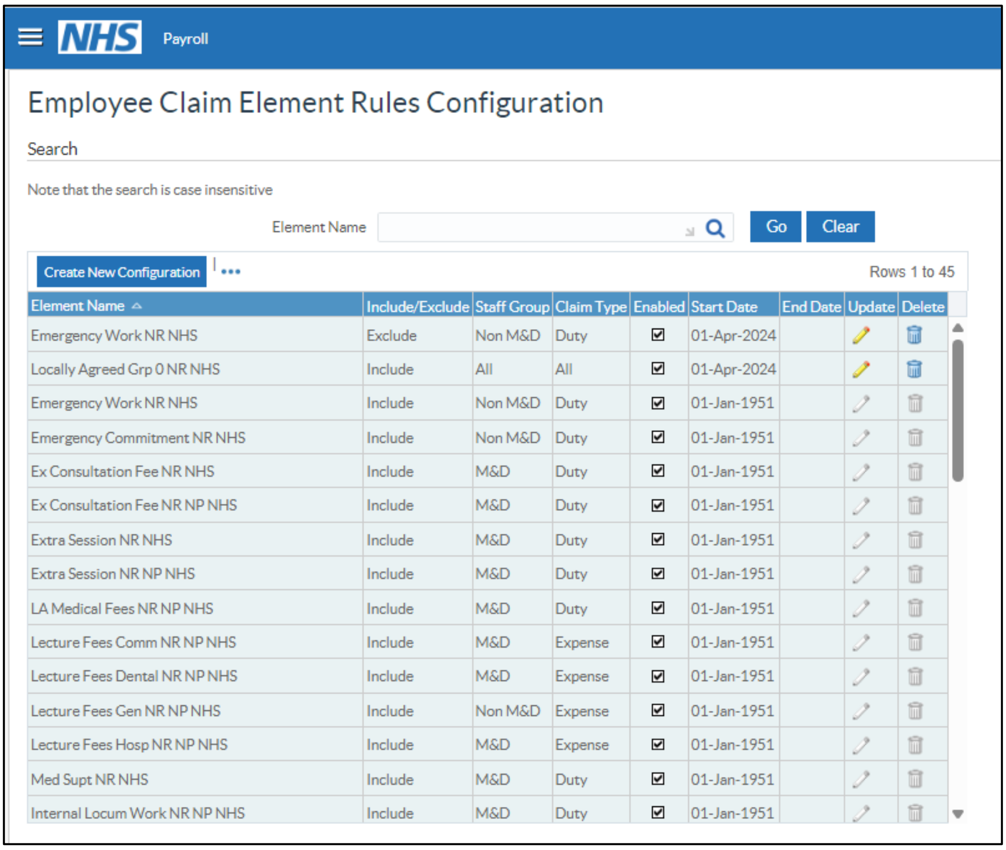
Employee Claims Elements Page

A new page, Employee Claim Elements, is now available to users within an organisation. This will work in a similar manner to the Average Pay Element pages currently in use and will be available to the XXX Payroll Super Administration users. This will be in the Payroll submenu below the other pages used to control the elements for other functionality such as the Average Pay solutions.



On first entering the page payroll users will see the claim elements defined for use nationally.

The layout is as follows:



Element Name	Include/Exclude	Staff Group	Claim Type	Enabled	Start Date	End Date	Update	Delete
Emergency Work NR NHS	Exclude	Non M&D	Duty	☑	01-Apr-2024			
Locally Agreed Grp 0 NR NHS	Include	All	All	☑	01-Apr-2024			
Emergency Work NR NHS	Include	Non M&D	Duty	☑	01-Jan-1951			
Emergency Commitment NR NHS	Include	Non M&D	Duty	☑	01-Jan-1951			
Ex Consultation Fee NR NHS	Include	M&D	Duty	☑	01-Jan-1951			
Ex Consultation Fee NR NP NHS	Include	M&D	Duty	☑	01-Jan-1951			
Extra Session NR NHS	Include	M&D	Duty	☑	01-Jan-1951			
Extra Session NR NP NHS	Include	M&D	Duty	☑	01-Jan-1951			
LA Medical Fees NR NP NHS	Include	M&D	Duty	☑	01-Jan-1951			
Lecture Fees Comm NR NP NHS	Include	M&D	Expense	☑	01-Jan-1951			
Lecture Fees Dental NR NP NHS	Include	M&D	Expense	☑	01-Jan-1951			
Lecture Fees Gen NR NP NHS	Include	Non M&D	Expense	☑	01-Jan-1951			
Lecture Fees Hosp NR NP NHS	Include	M&D	Expense	☑	01-Jan-1951			
Med Supt NR NHS	Include	M&D	Duty	☑	01-Jan-1951			
Internal Locum Work NR NP NHS	Include	M&D	Duty	☑	01-Jan-1951			

The list of elements available will be defined nationally and held in the element set NHS_EMP_CLAIMS.

The value set for staff group will be NHS_EMP_CLAIM_STAFF_TYPE and will have the values:

Code	Meaning
MD	M&D – elements specific to Medical & Dental staff
NMD	Non M&D – elements for all other staff groups except Medical & Dental
ALL	All – elements that can be used for any staff group

This will be used to control which elements are available to a particular user in the Claims page. On opening the page, the user must select the assignment the claim is for (where they have more than 1 assignment).

For this assignment the staff group will be looked up as follows:

Assignment > Position > Occupation Code > Attribute 1 (value Set NHS_Occ_Code_Category)

This value is then decoded as follows:

'M and D' = M&D

Everything else is treated as 'Non M&D' ('N and M' or 'Gen' values)

The list of elements each user sees will depend on whether they are considered to be M&D or Non M&D.

The value set for claim types will be NHS_EMP_CLAIM_EL_TYPE and will have the values:

Code	Meaning
EXP	Expense – elements relating to expenses
DUTY	Duty – elements relating to duty payments
ALL	All – non-specific elements

This will be used to give organisations a further level of control over which elements they choose to allow claims to be made for. The organisation sets this value at payroll level (on the Payroll DFF segment outlined above) and this controls which set of elements the assignments in that payroll are allowed to enter. This value may be overridden for a given assignment in Element Entries.

For an Assignments to be able to make a claim one of the following must be true

(They have the Employee Claims NHS element with the input value 'Payroll Default'

AND

The Payroll DFF for their payroll has a value set for Employee Claims

)

OR

(They have the Employee Claims NHS element with the input value set with an override value of 'Expense', 'Duty' or 'All'

)

Element Claim Rules have an effective start date and effective end date. The rules that apply to a new claim will be those that are active as the date the claim is being made in Employee SSHR (such as Claim Date, which will be defaulted in the Employee Claim page to sysdate).

The rules regarding inserts, updates and deletes in the elements page:

- Only local rules can be disabled, updated or deleted.
- A national rule must be first be excluded locally and then re-included locally if it needs to be changed.
- A local include rule for an element cannot be added if a national rule already exists for the element, and this has not been locally excluded first.
- A local exclude rule will not save unless it is EXACTLY negating the national rule for the same element. All values must match including dates.
- New local rules can only be setup for elements defined in the national element set NHS_EMP_CLAIMS.

Any subsequent changes to the national rules after go-live (and after local rules may be in place for the same elements that are changing) will need to be managed carefully.

This is because a new national rule for an element or a change to an existing national rule for an element could invalidate any local rules that have been set up for the same element.

For this reason, after any national rule change, the local rules for the same element will be invalidated.

If these local rules are still required, then they must be re-enabled locally and will be revalidated at this time to make sure they still comply with the new updated national rule.

Mileage Elements

If mileage elements are to be used, organisations need to ensure the relevant information is held in the vehicle repository to enable payment to be made without the need for manual intervention from payroll teams.

A payroll user may still need to review mileage entries to ensure they are correct and will be paid as expected during the payroll run.

Organisations may wish to exclude certain mileage elements (using the Employee Claims Elements page as outlined above) if they do not wish for certain elements to be used for Employee Claims.

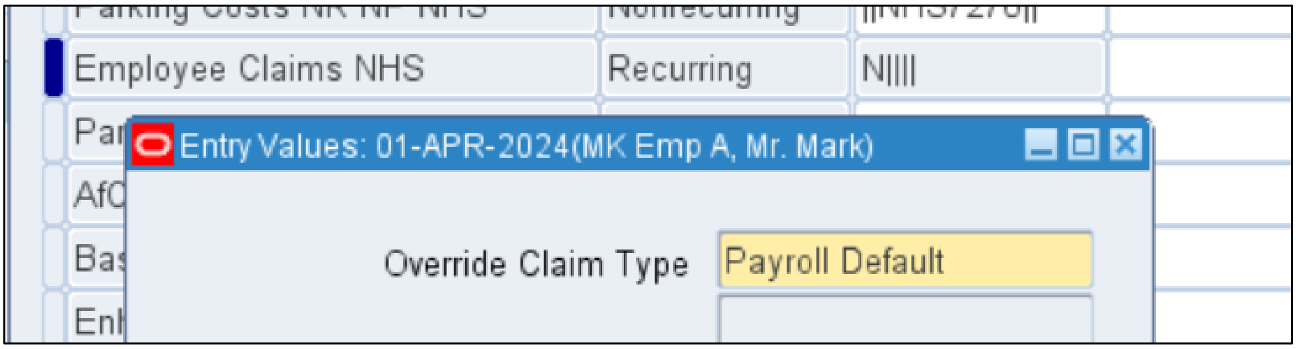
Employee Claims Element

The Employee Claims element must first be assigned to an assignment before claims can be made for that assignment.

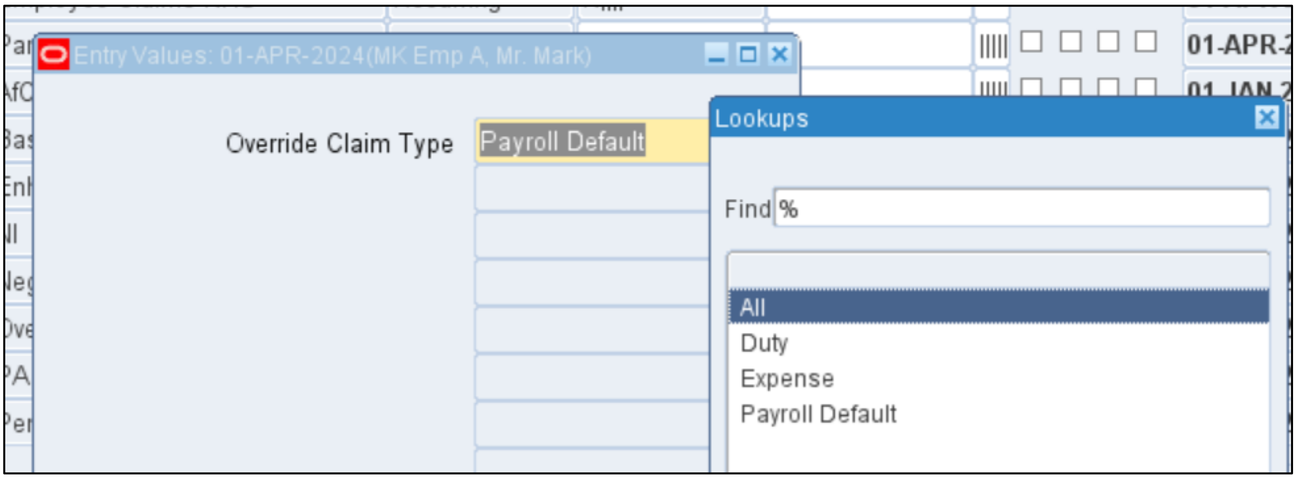
Organisations are responsible for deciding who should be enabled for this functionality and should then assign the element to the appropriate assignments.

The element is called ‘Employee Claims NHS’.

This can be assigned with the default input value to give the user access to the claims form, with the claim type as defined on the payroll definition.



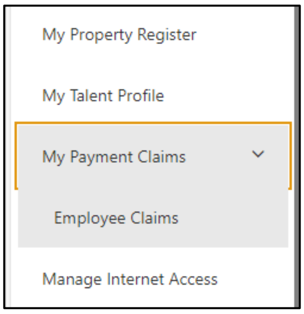
Alternatively, the administrator can choose to override the payroll setting for an individual assignment by selecting an override value for the element. The value set will have the same additional values as the payroll segment.



Employee Claims: Summary Page

A page will be added to Employee Self Service to allow employee assignments to make claims, where they have been enabled to do so.

This will be available from the My ESR dashboard in the main menu on the left-hand side in a new sub-menu called My Payment Claims:



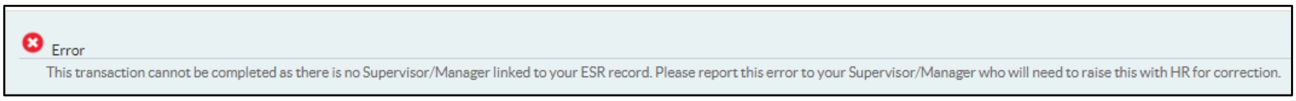
This functionality will not be available to Employee Self Service (Limited Access).

On selecting Employee Claims the user will go to the Employee Claims: Summary page.

Some initial validation will occur here as follows (all validations are as at the current date):

The page will check that the employee has a direct supervisor defined on their assignment record. If not, the following error will be displayed:

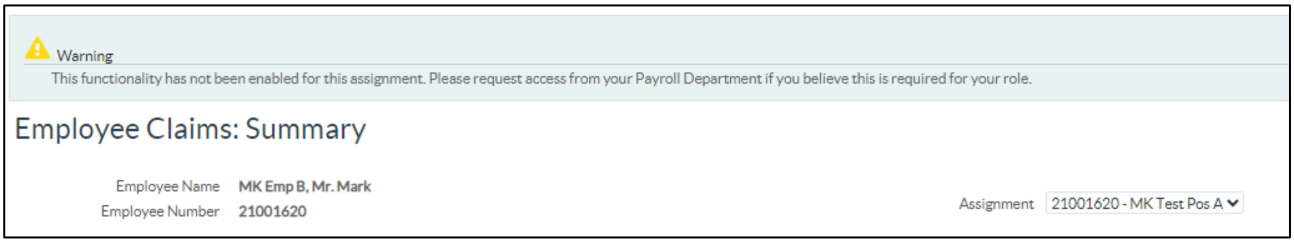
This transaction cannot be completed as there is no Supervisor/Manager linked to your ESR record. Please report this error to your Supervisor/Manager who will need to raise this with HR for correction.



The page will default to the employee's primary assignment. This will be validated to see if this assignment has access to make an employee claim as at today (check that they have the Employee Claims NHS element attached). If the assignment has not been granted access the following error message will be displayed:

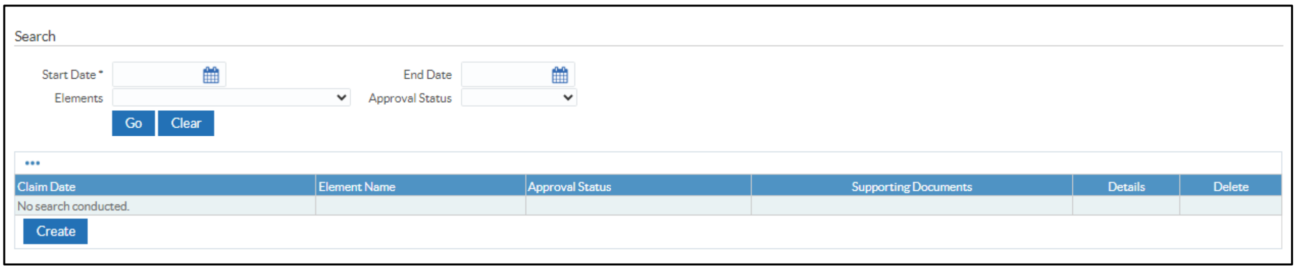
This functionality has not been enabled for this assignment. Please request access from your Payroll Department if you believe this is required for your role.

This warning is displayed at the top of the page like this. No further action can be taken for this assignment in this page.

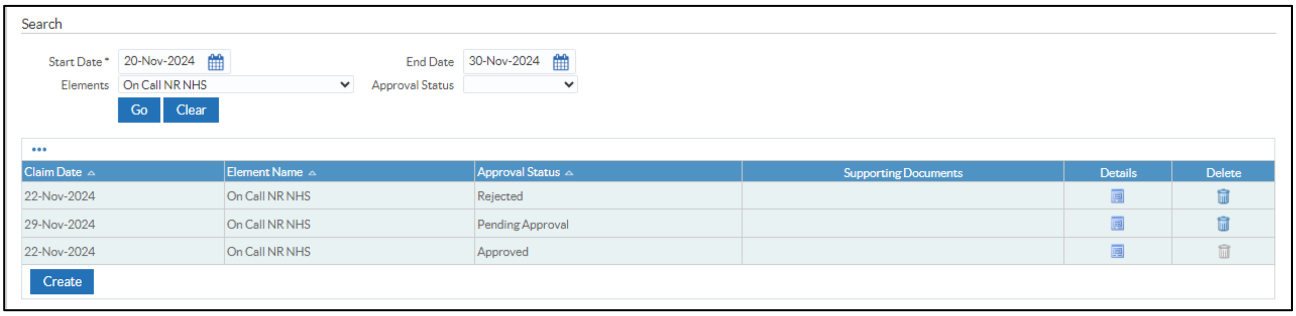


Where the user has multiple assignments, this validation will be triggered for the current assignment after each change of assignment. An assignment can be changed using the pick list shown as part of the employee details.

The Summary page can also be used to review the history of previous claims using the search functionality.



For example, enter a date in the Start Date field and click Go and all element rows for all previous claims submitted on or after this date will be returned for the assignment. Also enter an End Date to search Claims submitted in just this this date range. Searches can be further restricted by also adding an Element Name and/or an Approval Status.



Use the details button to review the input values associated with an element line.

Element lines that are not approved can also be deleted in this view, for example after submission but before approval the user can still delete an element line from a claim.

NOTE: The delete functionality should be used with care, especially for 'Pending Approval' rows, as it will affect the notifications already sent to the manager regarding this claim.

Employee Claims: Create Page

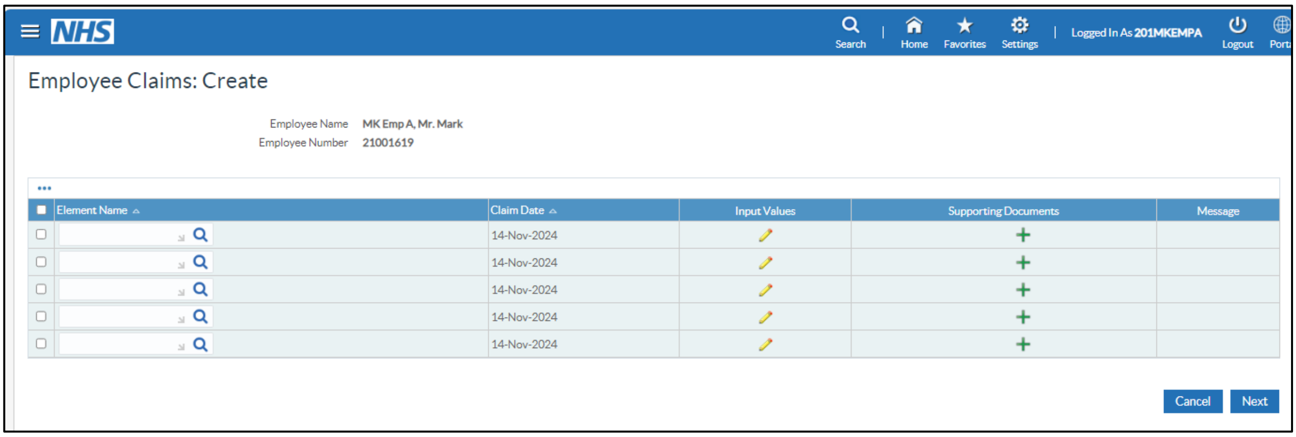
Where the assignment is allowed to make claims, then they can use the Create button to jump to the Create Claims page. The elements available for selection by the user will be those defined in the Employee Claim Elements page for the organisation.

This full list available to an assignment will be filtered using the following criteria:

- The claims type available to this assignment - Expense, Duty or Both. This will be as defined on the assignment's payroll, unless this value was overridden on the Employee Claims element for the assignment.
- The staff group the assignment is in - 'M&D' or 'Non M&D'. This is derived from the assignment's position as follows:

Assignment > Position > Occupation Code > Attribute 1 (value Set NHS_Occ_Code_Category)

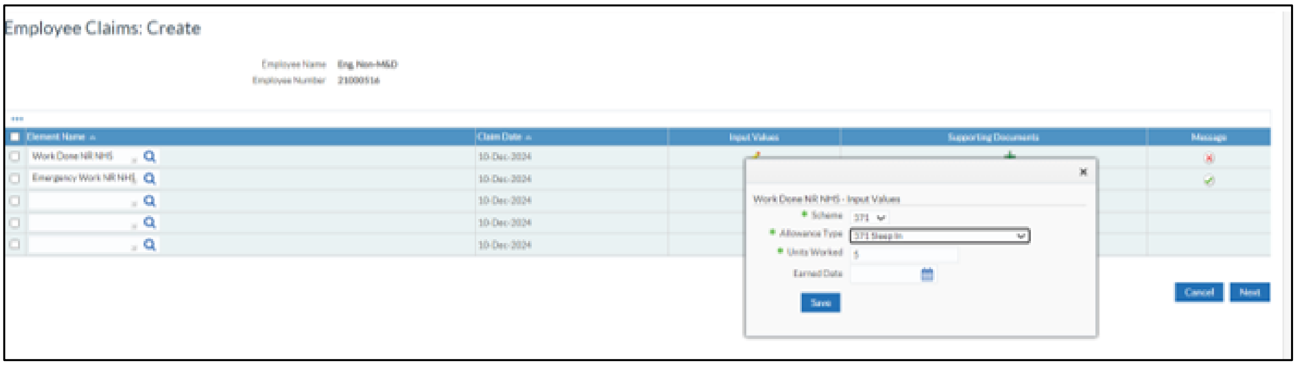
Where 'M and D' is taken as 'M&D' and everything else is 'Non M&D'



The elements available in the Employee Claims page will be those defined in the Employees Claims Element page for the organisation, with any local include/exclude rules applied.

For each element selected the user should see all the user enterable input values for the elements listed in the display order, so in the same order as when viewed in the element entry form in the application.

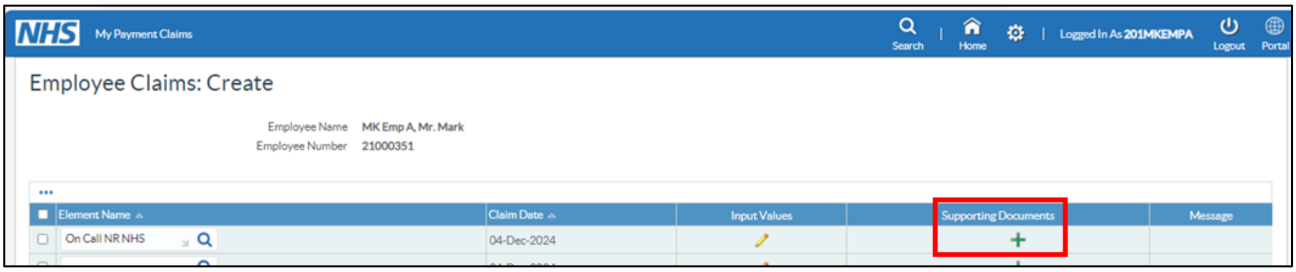
Validation will occur on clicking the next button for any rules that would prevent the element being written to element entries. This includes GRR eligibility and any input validation of type error. In the Message column, this will be shown by a green tick or red cross.



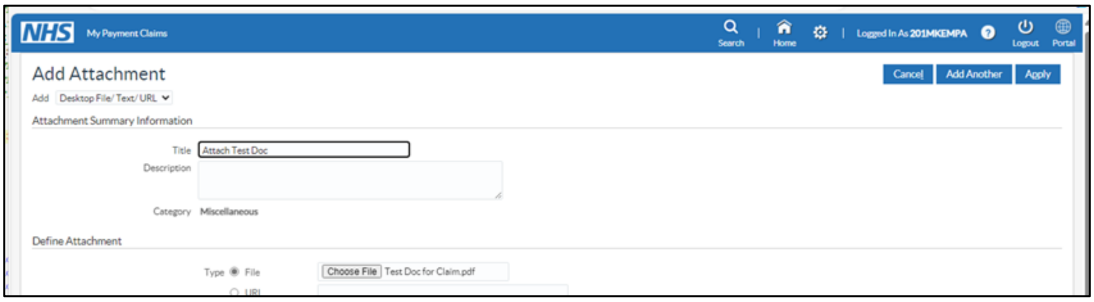
NOTE: Some element validation that has been setup as warnings in core forms, such as some max / min conditions will not be enforced in this form.

By default, the page will open with 5 lines available for user entry. If more than 5 claim elements are required, then additional claims would need to be created by the user.

Users can attach supporting documentation, as required, using the supporting documents icon available in each claim line.



Clicking this opens the attachments page allowing the user to attach a file or some additional text to the claim row.



This additional information is available for review by the manager from the manager approval notification and, on approval, it gets stored against the newly created element entries. It is then available for review by payroll from the element entries form. Where the claim is rejected by the manager then the attachments are only available to the manager for as long as they still have access to the notification.

Where all element lines are valid then clicking Next should navigate to a review page.

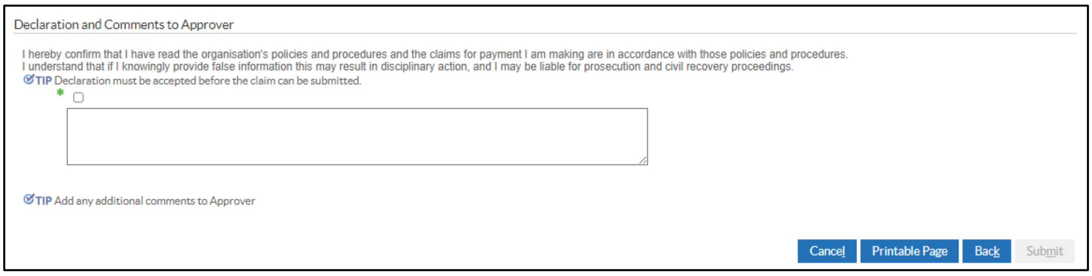
Employee Claims Review Page

Before allowing the user to submit a claim, the review page will enforce that the employee declaration has been first approved by the user. The wording of the employee declaration is as follows:

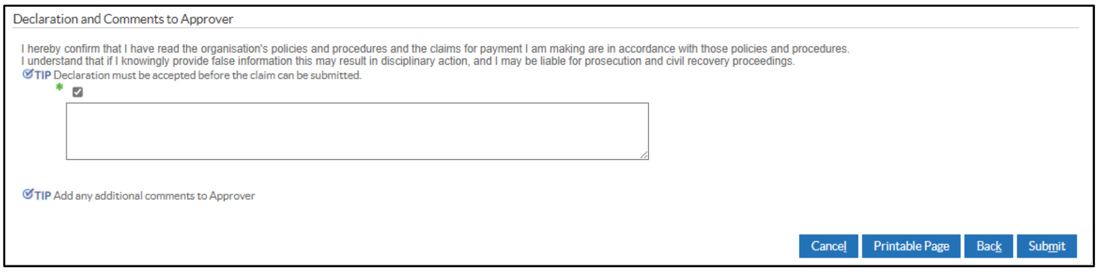
I hereby confirm that I have read the organisation's policies and procedures and the claims for payment I am making are in accordance with those policies and procedures.

I understand that if I knowingly provide false information this may result in disciplinary action, and I may be liable for prosecution and civil recovery proceedings.

This page has the Submit button disabled before the declaration has been approved:



Once the Declaration has been accepted by ticking the box, then the submit button will be enabled to allow the claim to be submitted.



Note: If the user navigates away from the review page after the declaration has been accepted, but before submitting e.g. to go back to review the claim elements, then on returning to the review page the Submit button may now be disabled again. If this occurs, then the user should un-tick and re-tick the declaration box to re-enable the submit button.

On submission the standard ESR SSHR Manager Approval workflow for the assignment will be used, this will include any additional supervisors defined for the assignment.

On approval the element entries will be applied to the next unprocessed pay period, that is the next period without any payroll runs or quickpays for the assignment.

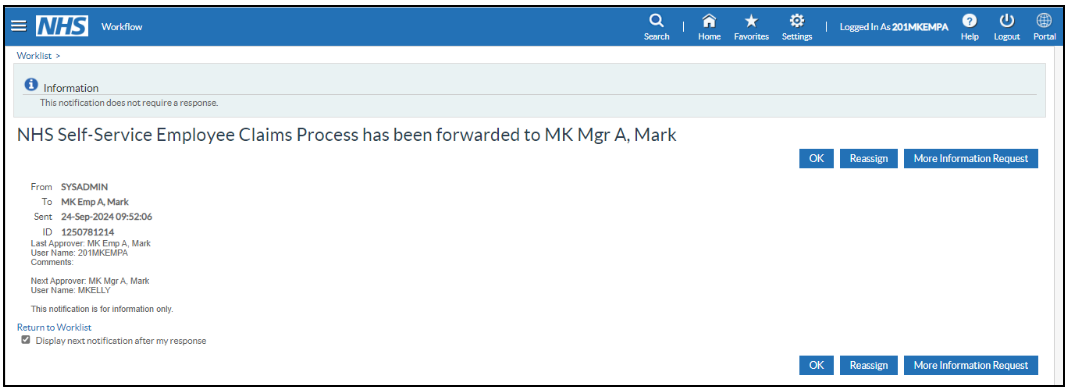
NOTE: Care must be taken to review any warning messages displayed at this stage and act on them. Ignoring a warning and attempting to submit the claim regardless can result in the claim failing. Failed claims can remain in the history and can appear as ‘Pending Approval’, if they fail at this stage.

Employee Claims Notifications

Notifications will be emailed, where the person has a valid email setup and has opted in for emailed notifications.

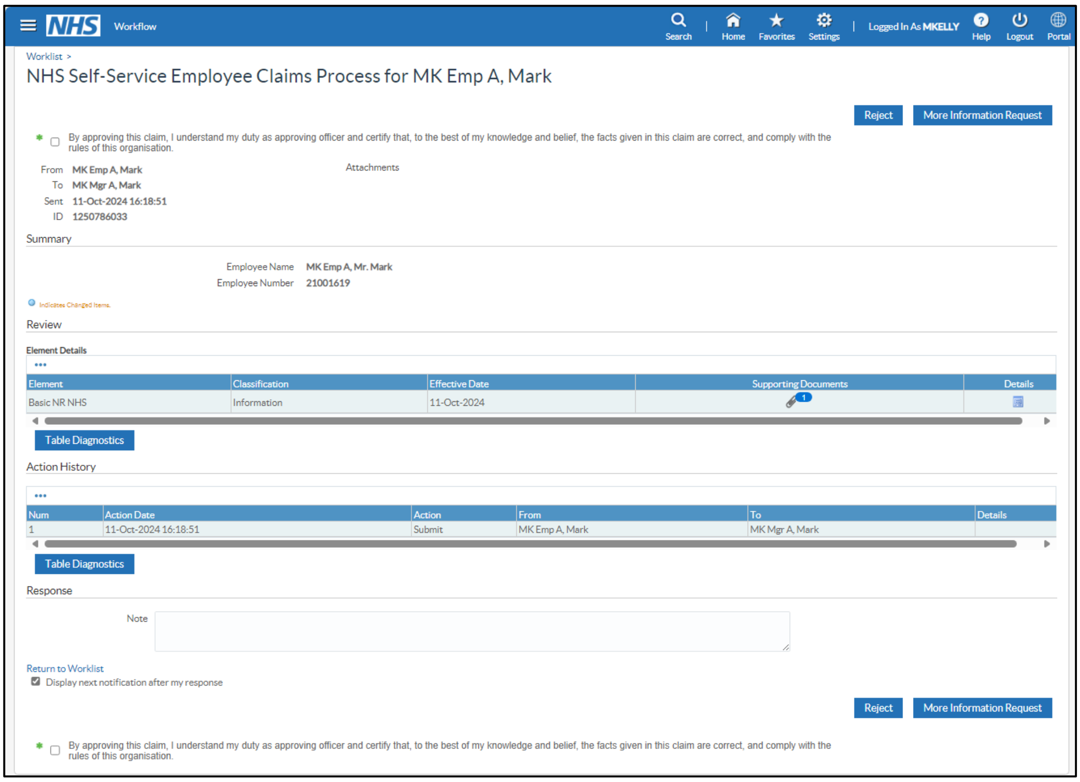
1. **Employee on Submission**

The employee receives a notification to tell them that their claim has been submitted for approval.



2. Manager on Submission

The manager receives a notification to ask them to approve a claim that has been submitted.



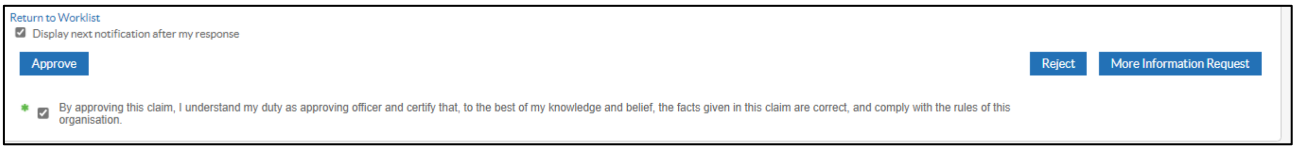
Managers have the option of reviewing individual element input values using the details icon against each claim row in the notification.

Similarly, they can review any supporting documentation using the supporting documentation icon against each claim row in the notification.

Before approval can happen, the page will enforce that the manager declaration has been approved. The wording of the manager declaration is as follows:

By approving this claim, I understand my duty as approving officer and certify that, to the best of my knowledge and belief, the facts given in this claim are correct, and comply with the rules of this organisation.

The notification can only be approved after this declaration has been accepted by clicking into the tick box. Only then will the approve button be visible and able to be selected.



Note: Once the manager ticks the box to approve the declaration, then this stays on for the notification, and cannot be unticked if the approval is not to be submitted. This does not stop the manager from choosing the other options ('Reject' or 'More Information Request'), if required.

The 'Reject' and 'More Information Request' buttons can be used at any time and are not linked to acceptance of the declaration.

This notification will remain with the manager until it gets actioned, it has no time-out.

The manager must accept the manager declaration in the notification before the claim can be approved.

Where it goes to multiple managers then the first to approve will complete the workflow and the other notifications for the other managers will be closed (same as for other SSHR manager notifications).

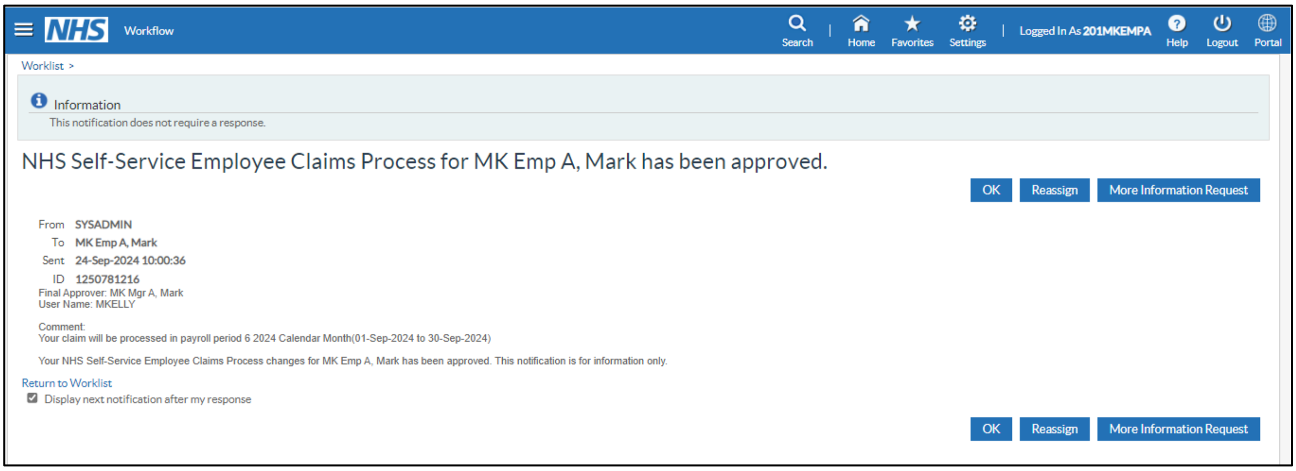
On approving a claim, the claim elements get written to element entries immediately. The audit flags on the element entries created will show these element entries were created by the manager at the time the notification got approved.

NOTE: The emailed copies of the Manager notifications will be FYI only. The manager cannot do any of the following via the email copy:

- Drill into the element details.
- Review any attachments.
- Accept the manager declaration.
- Approve the claim.

3. Employee on Approval of Claim

The employee receives a notification back to inform them of the manager's action.



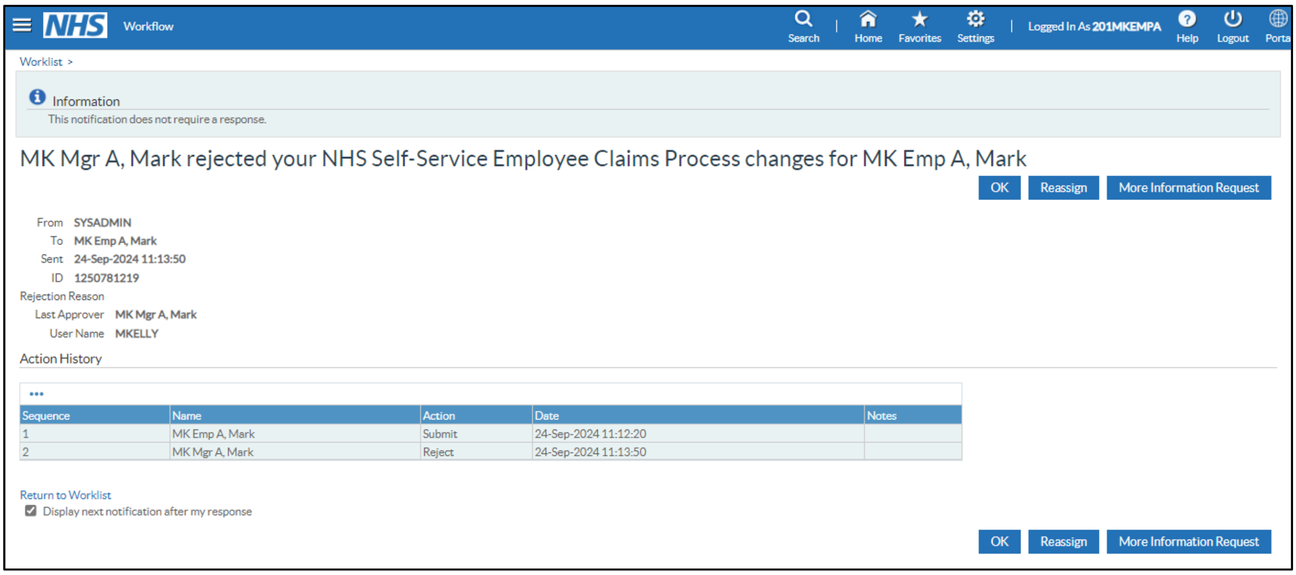
Where the Claim has been approved, then the notification will have a sentence in the body as follows:

Your claim will be processed in payroll period <Period Name> (<period_start_date> to <period_end_date>).

In this way the employee can see which period to expect the associated payments to be made in.

4. Employee on Rejection of Claim

The employee receives a notification back to inform them of the manager's action.



NOTE: If the claim is rejected, it cannot be amended and resubmitted. A new claim will need to be created with the revised information and submitted for approval.

Employee Claims Impact for Payroll Users

On approval of a claim the claim elements for the employee assignment are written to element entries and can be reviewed in the core application element entries form.

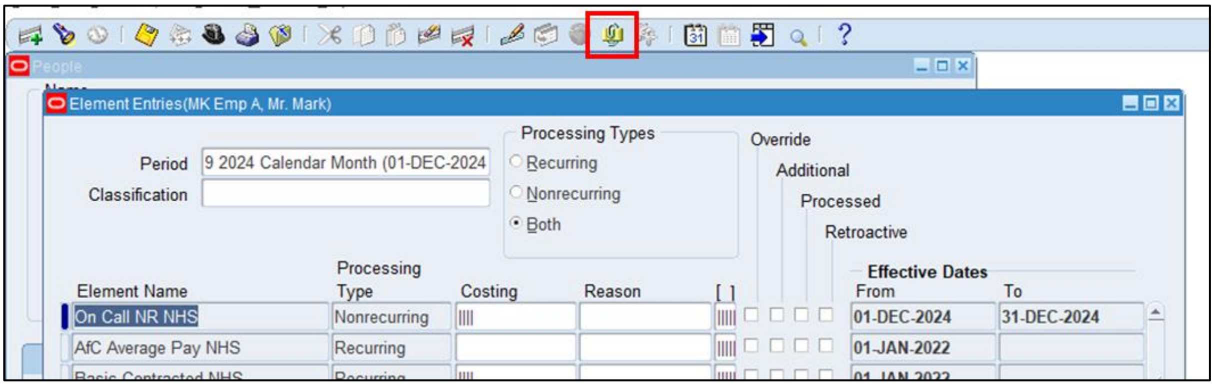
Once created these entries will behave as any other element entry and can be updated or deleted by payroll users as required.

As at the point of approval the period the new element entries will be created into will be determined as follows:

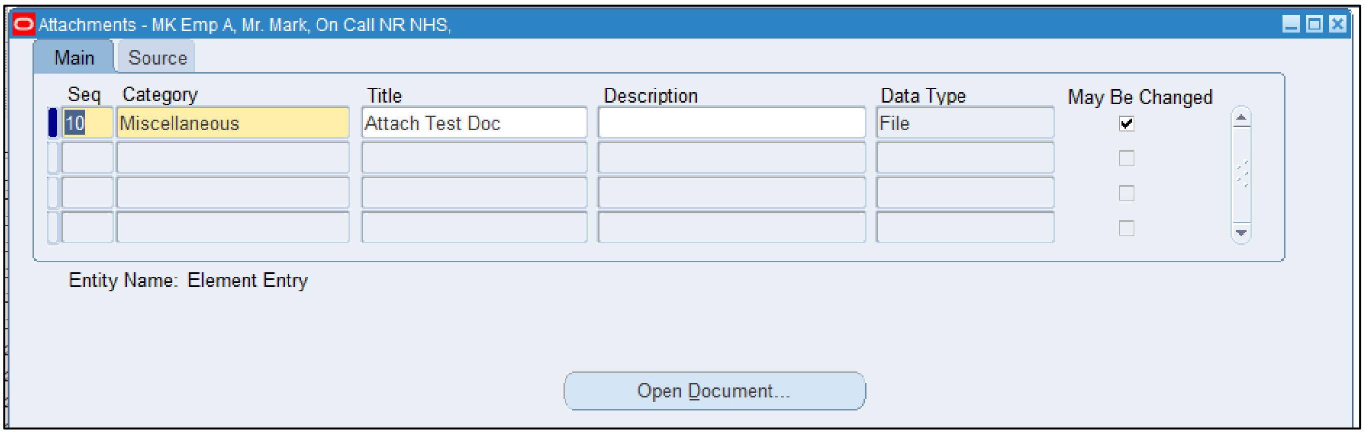
- Use the current period (as at today) if this has not been processed yet (payroll or quickpay run)
- Else use the next unprocessed period for the assignment

The standard audit functions are in place and the element entries will be identified as having been created by the manager who approved the claim and dated as at the point of approval.

Any attachments that were added to element lines in the claim will also be saved to the element entries form. Payroll users can review these using the standard attachments functionality i.e. when the elements are reviewed in the element entries form the attachments paperclip icon at the top of the form now shows that an attachment is available for this element entry.



Click the paper clip and the attached document can be reviewed.



Change Event Log

New Change Event Log events have been created to track the Employee Claims process from end to end.

The new events are

- Create Employee Claim
- Approve Employee Claim
- Reject Employee Claim

On submission of a new claim a Create Employee Claim row will be created for each element within the claim. This will record the following information:

- User who submitted the claim
- Person ID the claim was for
- Assignment ID the claim was for
- Date and time of submission of the claim
- Element Name
- Input Values supplied for the element
- Record ID – unique to this element in this claim

On approval of a claim an Approve Employee Claim row will be created for each element within the claim.

This will record the following information:

- User who approved the claim
- Person ID the claim was for
- Assignment ID the claim was for
- Date and time of approval of the claim
- Start Date of the payroll period the element has been created in (recorded as Change Effective Date)
- Element Name
- Input Values supplied for the element
- Record ID – unique to this element in this claim – can be matched to corresponding create event

On rejection of a claim a Reject Employee Claim row will be created for each element within the claim.

This will record the following information:

- User who rejected the claim
- Person ID the claim was for
- Assignment ID the claim was for
- Date and time of rejection of claim
- Element Name
- Input Values supplied for the element
- Record ID – unique to this element in this claim – can be matched to corresponding create event

Where a manager returns a claim for more information, then no new event will be recorded until the final approve / reject decision is made.

4 Annual Leave Balances to Include Buy/Sell A/L

The existing elements for Buy Sell Annual Leave only handle the payments involved in buying or selling leave, not the actual changes to the accrual balances.

- Buy Sell Annual Leave 1 NHS
- Buy Sell Annual Leave 2 NHS

Two new elements have been delivered that will allow the accrual balance to be altered in line with the payments. The new elements will be called:

- AL Adjust Bal Buy Sell 1 NHS
- AL Adjust Bal Buy Sell 2 NHS

The user enterable input values will be

- Total Cash Amount: Money
- No of Periods: Number
- Plan Adjust Hours: Hours
- Plan Adjust Days: Day
- Plan Effective Date: Date

Two versions have been supplied, similar to the existing elements. The second version would only be required if a second agreement to Buy/Sell Annual Leave was entered into before the first agreement had completed processing payments. The elements are specific to the assignment and only affect the accrual plan the assignment has been enrolled into, so element 1 on assignment A will only affect the accrual plan on assignment A. The same element can be used on assignment B and would only affect the accrual plan on assignment B.

For an assignment purchasing additional leave, the user should enter a negative Total Cash Amount to recover the cost of the leave and a positive adjustment to increase the accrual balance.

For an assignment selling leave, the user should enter a positive Total Cash Amount to pay the cost of the leave being sold and a negative adjustment to decrease the accrual balance.

In both cases the number of periods for the cash amount to be paid/recovered over should also be entered. The payment side of the new elements will work in a similar way to the existing elements.

The adjustment side of the elements work by affecting the accrual plan that the assignment is enrolled into.

If the assignment is in a day's accrual plan, then the Plan Adjust Days value should be used.

If the assignment is in an hour's accrual plan, then the Plan Adjust Hours value should be used.

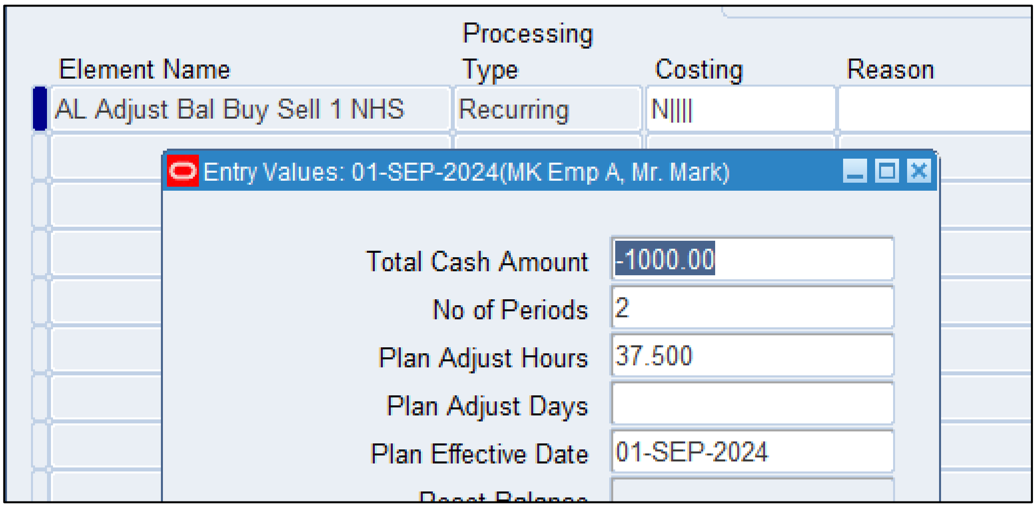
The Plan Effective Date is used to control which leave year for the assignment the adjustment to the accrual balance should affect, so it is possible to make payments this year for leave that was bought/sold from last year's balance. The element should usually be placed into the next period so that the payroll payments get processed, but the plan effective date can be last year to affect last year's balance.

The accrual plan definitions will be updated to recognise these new elements as plan adjustment elements.

In the core application the accrual screen for an assignment will now show the 2 adjustment elements – see examples below.

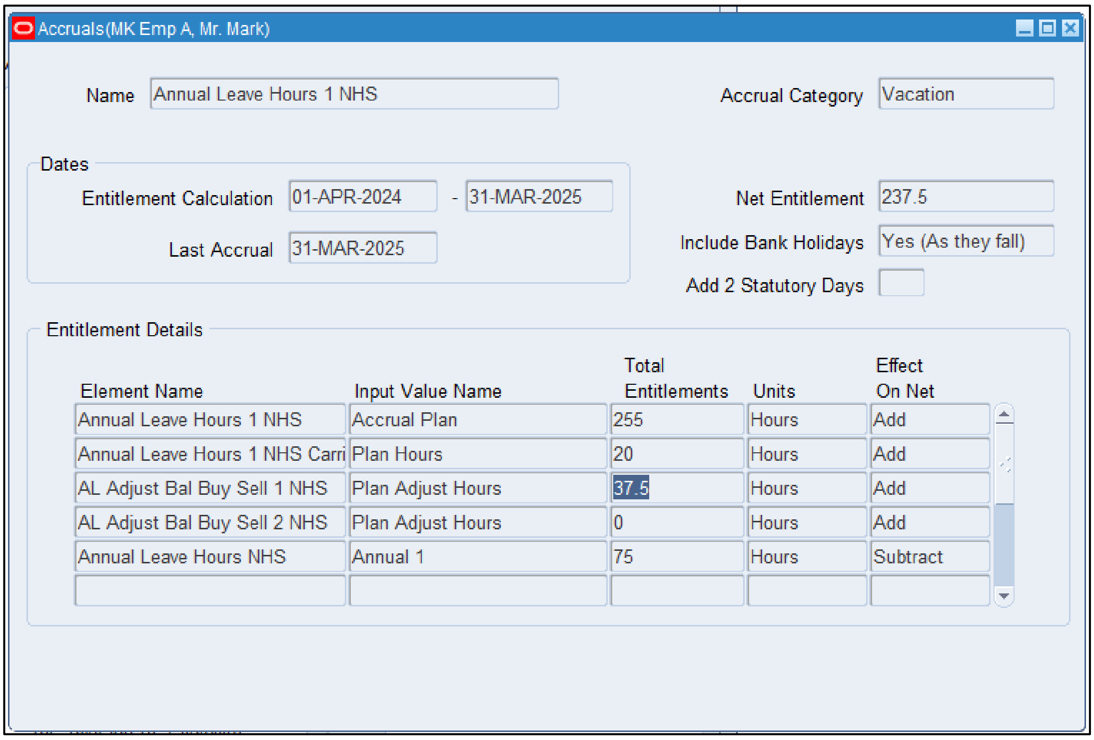
<u>Example 1 – Buying Additional Leave</u>

Employee A is in the Annual Leave Hours 1 Plan and they wish to purchase an additional 37.5 hours of leave.
The cost of this leave would need to be calculated manually using the rules in place locally, but for this example it is assumed that this amount of leave would cost the employee £1000. This cash amount is entered as a negative value as it is a cost to the employee.
It has also been agreed that the employee can pay this amount back over 2 pay periods, so £500 per period. This can be entered onto the new element as follows:

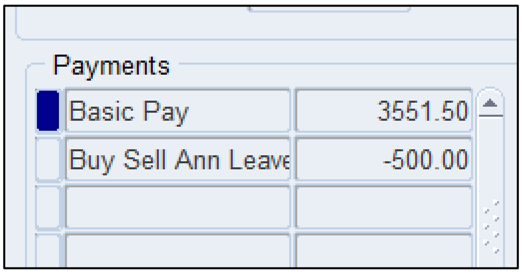


On saving the element entry, as above, the effect of the adjustment part of the element can be seen immediately in the accrual form. The adjustment part of the element does not rely on payroll being run.

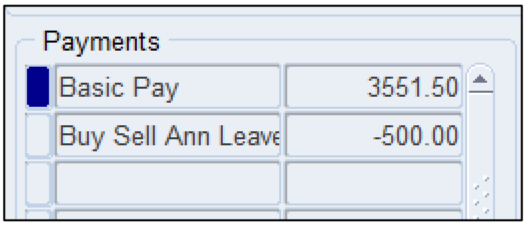
Where an AL Adjust Bal element has been used to purchase leave, and the Plan Effective Date used on the element is within the Entitlement Calculation range, then this amount will be added to the leave entitlement for this leave year for the assignment.



If the element above was entered into the period for Sep-24, then when Sep payroll run the results would look like this



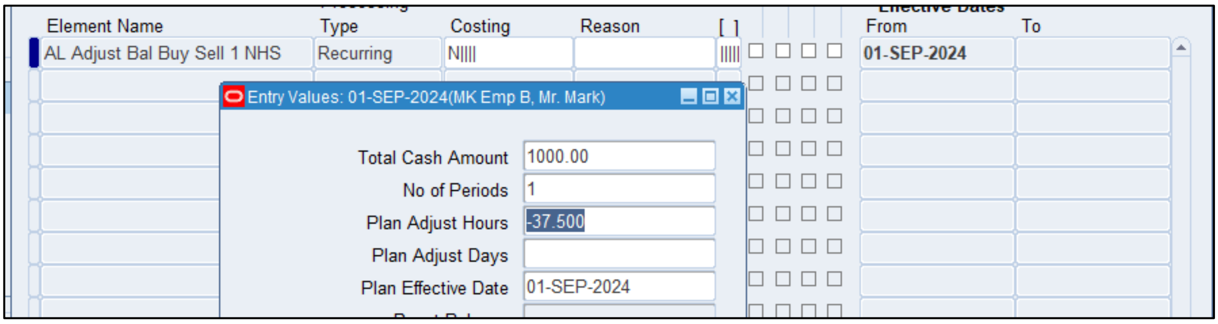
The same amount would be taken in the Oct payroll, but as the full amount has now been taken the element will also be automatically end dated at the end of October by the October payroll run..



Review the element entry after the October run and it will now look like this:

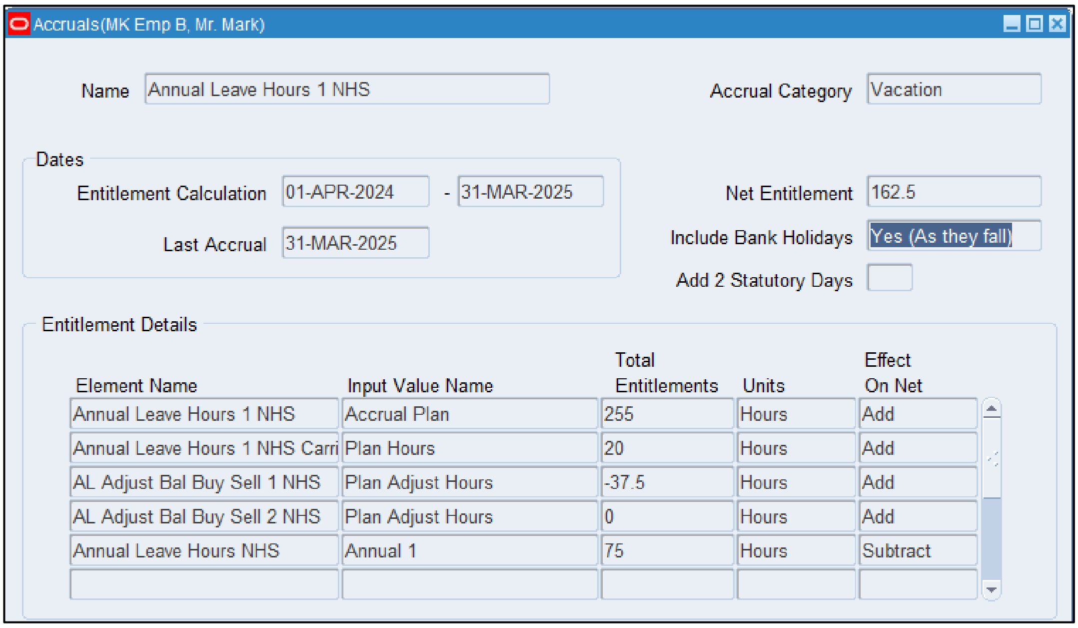
Example 2 – Selling Leave

Employee B is also in the Annual Leave Hours 1 Plan and they wish to sell 37.5 hours of leave.
For this example, it is assumed that this amount of leave would be worth £1000 to the employee. This amount is entered as a positive value as it will be paid to the employee.
It has also been agreed that the employee will be paid this amount in a single payment, so periods = 1.
This can be entered onto the new element as follows:

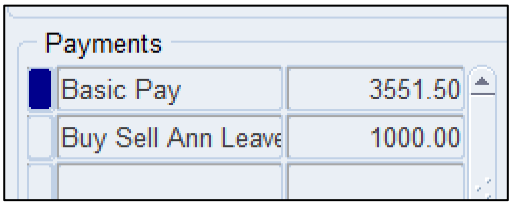


On saving the element entry, as above, the effect of the adjustment part of the element can be seen immediately in the accrual form. The adjustment part of the element does not rely on payroll being run.

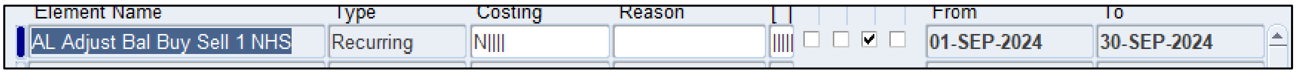
Where an AL Adjust Bal element has been used to sell leave, and the Plan Effective Date used on the element is within the Entitlement Calculation range, then this amount will be subtracted from the leave entitlement for this leave year for the assignment.



If the element above was entered into the period for Sep-24, then when Sep payroll run the results would look like this:



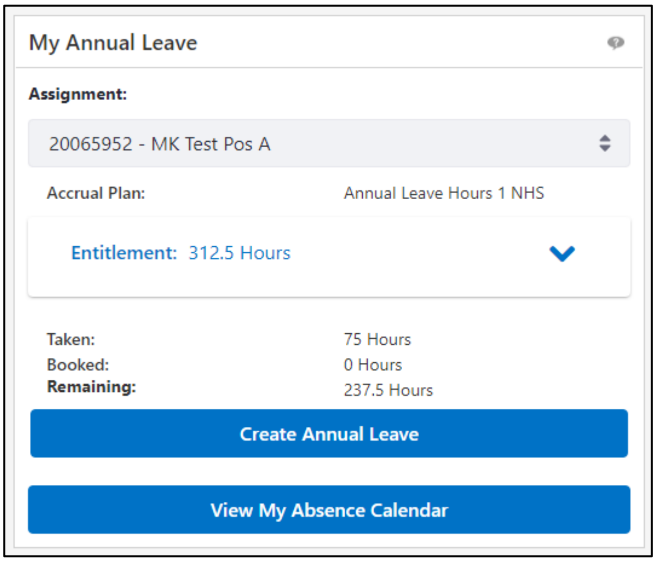
The full amount would be taken in the September payroll run and the element will also be automatically end dated. Review the element entry after the September run and it will now look like this:



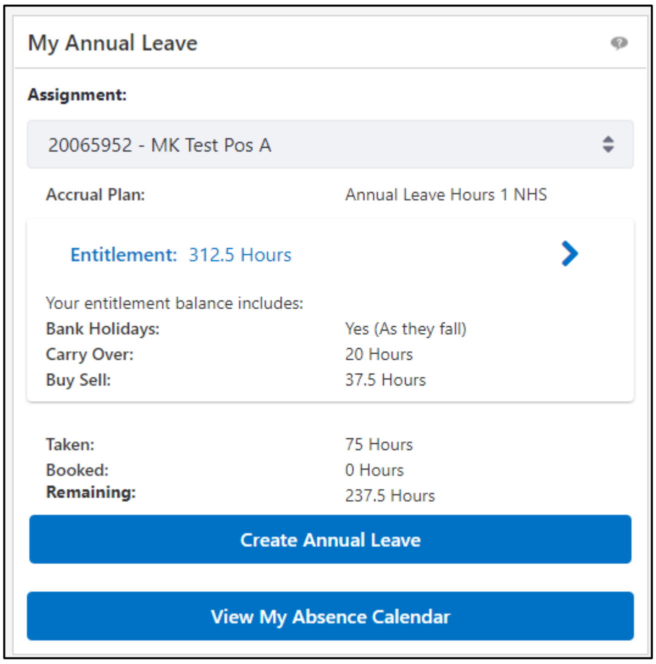
Portal

The same employees can review their leave balances in portal and see the figures updated accordingly for any Buy/Sell amounts that have been entered.

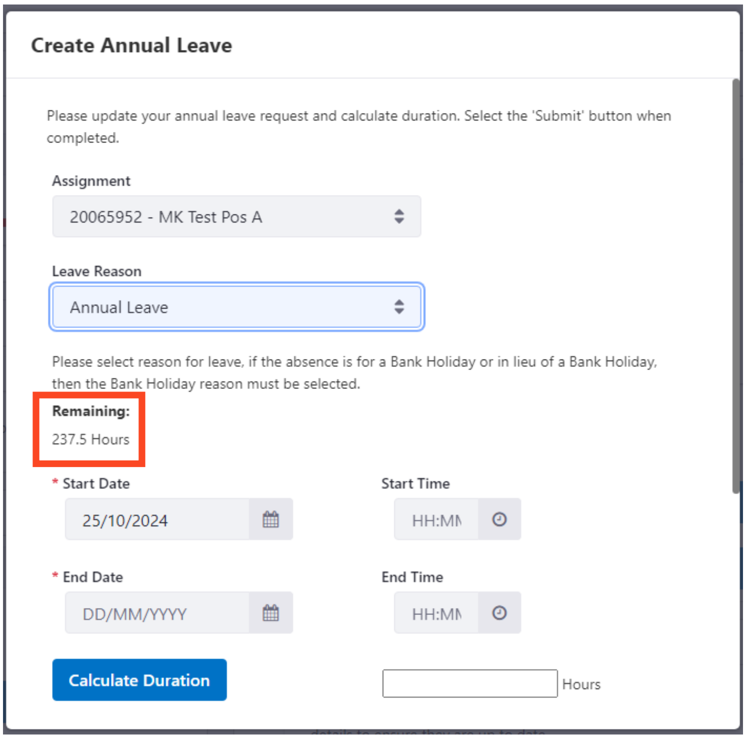
Employee A > My ESR > My Annual Leave



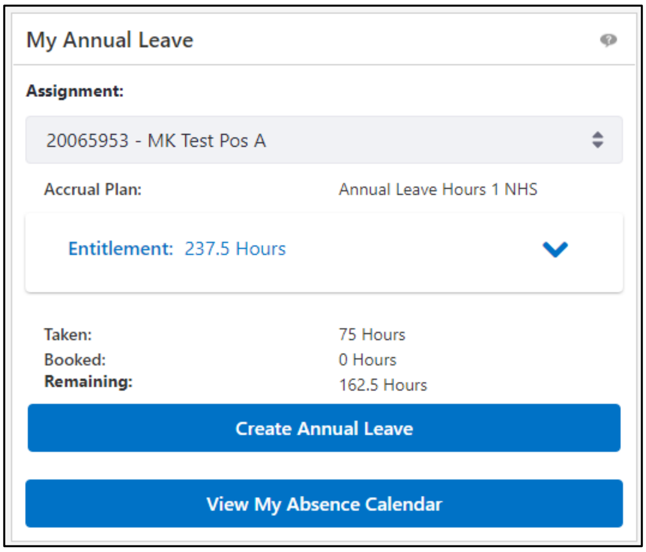
The gross entitlement figure will include the Buy Sell amount. The user can expand this figure to see a more detailed breakdown of how the gross entitlement is made up.



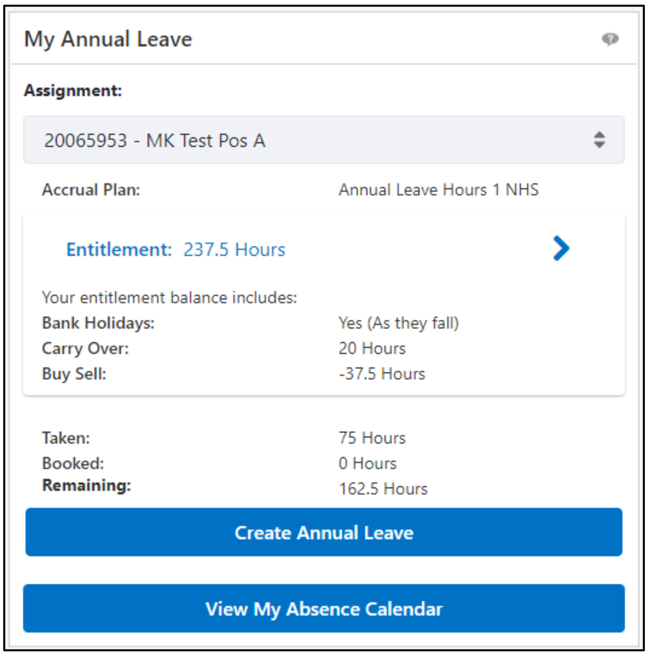
When the user tries to create a new piece of Annual Leave the same figure for remaining leave is used in the create page.



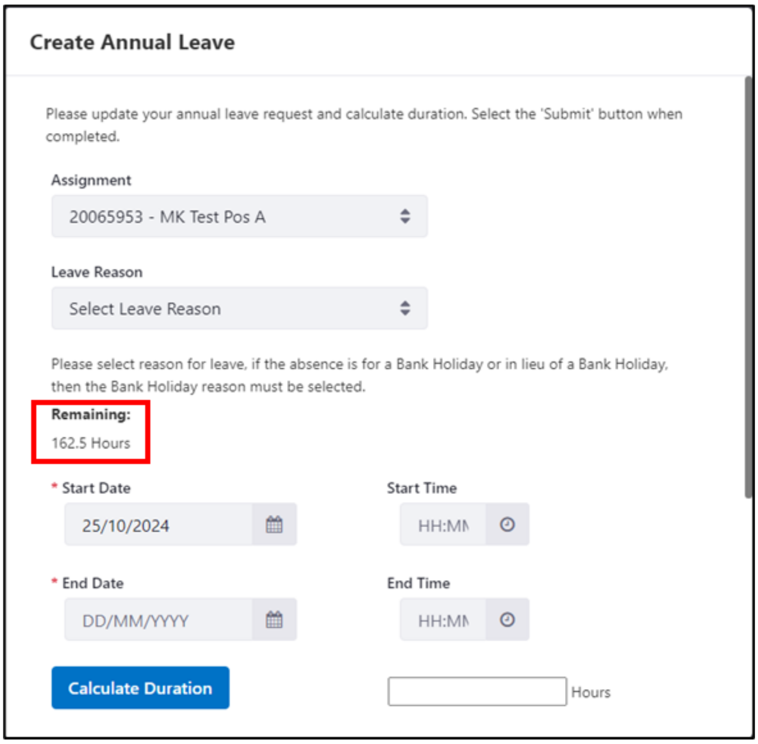
Employee B > My ESR > My Annual Leave



The gross entitlement figure will include the Buy Sell amount. The user can expand this figure to see a more detailed breakdown of how the gross entitlement is made up.



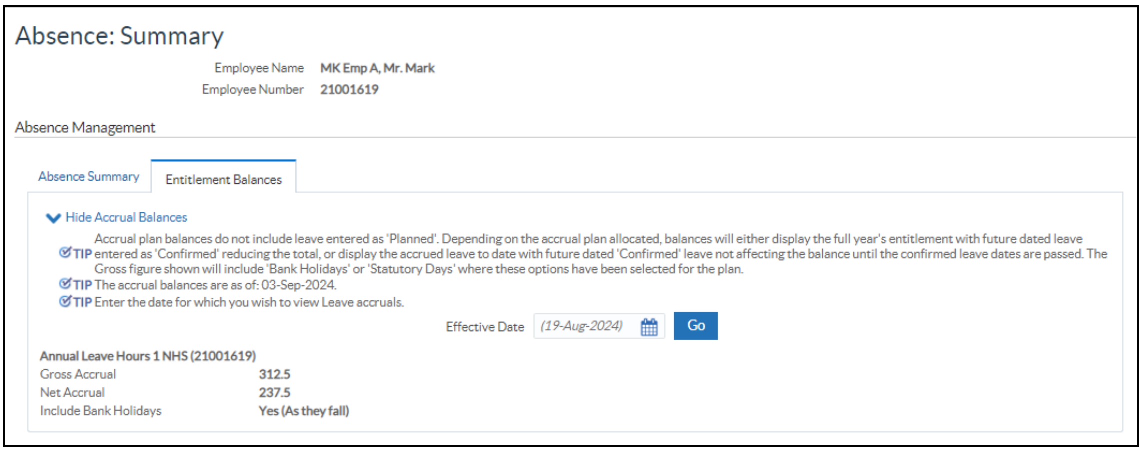
When the user tries to create a new piece of Annual Leave the same figure for remaining leave is used in the create page.



Employee Self Service

When these employees view their entitlement in Employee Self Service they will now see the displayed values including any Buy/Sell amounts.

Entitlement Balances in Absence summary



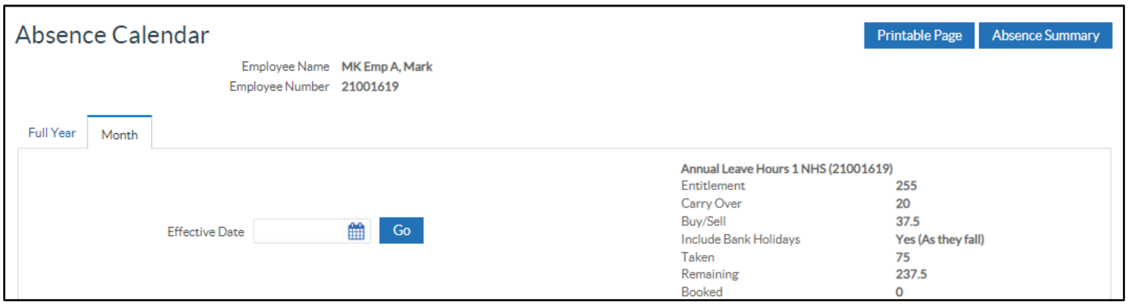
The Gross Accrual figure is now calculated as:

Plan Entitlement + Any Carryover + Any Buy/Sell Adjustment

The Net Accrual figure is this figure minus any leave taken.

Managers can also view this page from Manager Self Service.

Employees may also see a more detailed breakdown of how this figure is made up in the Absence Calendar page by going to the Month tab.



WARNING: Because the AL Adjust Buy Sell elements are being used to adjust the Accrual balances, they will NOT support date track changes. Any date tracked change made to the element will cause it to be counted multiple times in the accrual calculation.

If changes are required to the payment side of the element, then this can only be done while the payments are still being made and must be done as a correction to the existing element.

If further changes are required to payments that have already be made to completion, then these must be setup as new additional adjustment elements. The AL Adjust Buy Sell elements can be used with Total Cash Amount and No of Periods only and no Plan Adjustment or Plan Effective Date in this scenario.

NOTE: The AL Adjust Buy Sell elements will NOT be recalculated as part of retro. This approach is consistent with the existing Buy Sell Annual Leave elements.

BI Updates for Buy Sell Annual Leave Elements

A new item will be added into BI to display the value of any adjustments from AL Adjust Buy Sell elements in place for the assignment.

This will be available from Human Resources – Annual Leave Balance > Balance Facts > Buy/Sell

In addition, the existing calculation for the following items will be updated to take account of any Buy/Sell adjustments for the assignment:

AL Balance Remaining = Plan Accrual + Carryover + Buy/Sell – Leave (taken and booked)

Gross Entitlement = Plan Accrual + Carryover + Buy/Sell

5 Last Login Details

This release has introduced a new feature called 'Last Login'. It is displayed on the ESR Navigator (under Logged In As XXXXX) as follows:

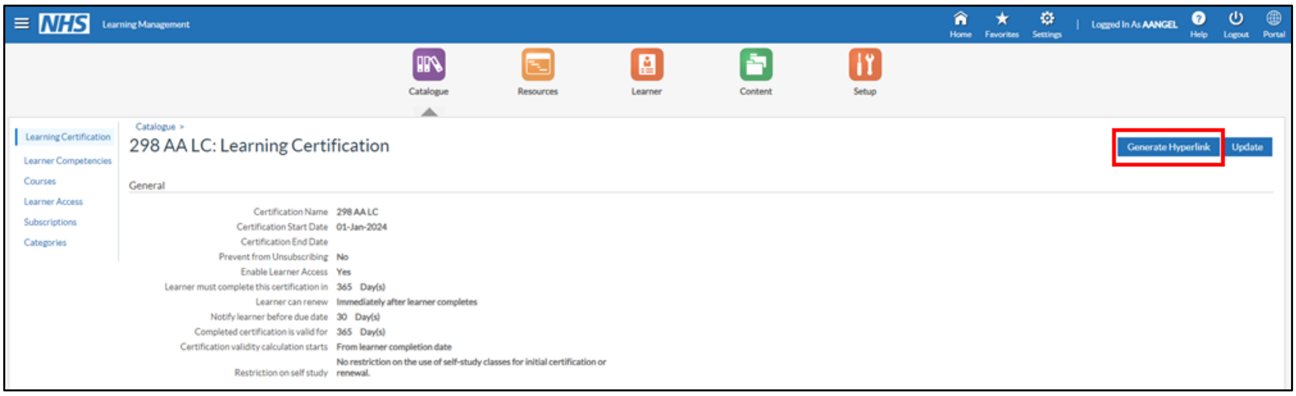
'Last Login DD-Mmm-YYYY HH:MM'

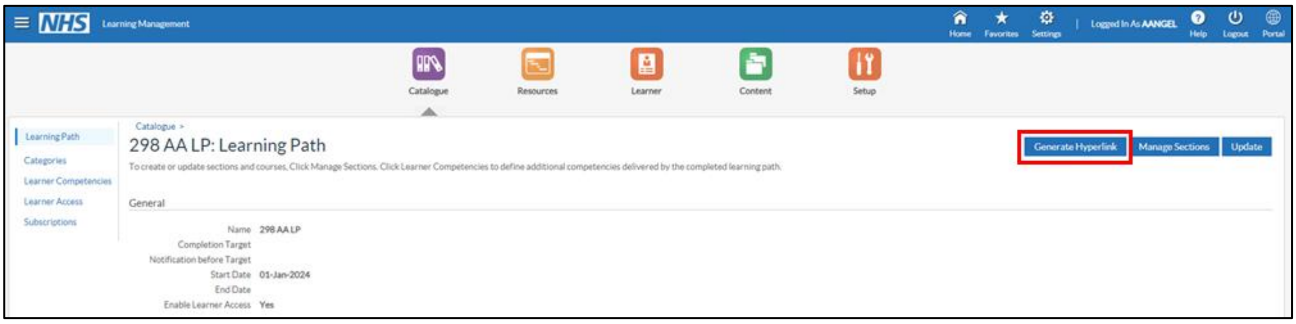
The Last Login feature provides information about the last date and time you successfully logged in to the system as a specific user.

6 Generate Hyperlink for Subscriptions

Learning administrators, can generate a hyperlink for a Learning Certification and Learning Path. This will direct learners to the associated Subscription page.

The new 'Generate Hyperlink' button is available on both Learning Certifications and Paths.





7 Use the Reset Button to Change Selection of Classes in Learning Certification

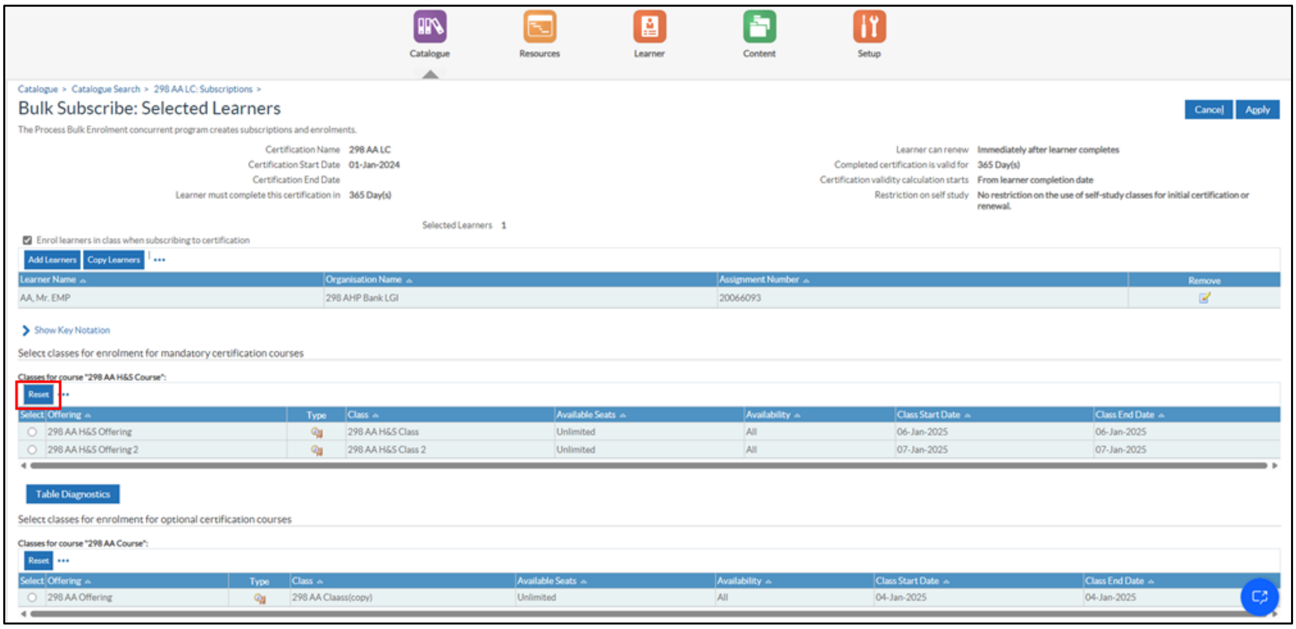
This release has introduced a new feature to reset the selection of classes within a Learning Certification. A 'Reset' button is now available for both mandatory and optional courses/sections. Where there is more than one mandatory class available NONE will be selected by default.

The following changes are made to the learning administrator and learner interfaces:

Learning Administrator

When subscribing learners to a certification, to change the selection of classes, a learning administrator can now use the Reset button on the Bulk Subscribe: Selected Learners page.

Previously, on this page, one class in each mandatory course would be selected by default. Now, if there is only one class in a mandatory course, then only that class is selected by default. Otherwise, no class will be selected by default.



Learner

Learners can change their selection of classes using the Reset button on the Learning Certification page.

Previously, on this page, one class in each mandatory course would be selected by default. Now, if there is only one class in a mandatory course, then only that class is selected by default. Otherwise, no class will be selected by default.

8 Change to Occupational Paternity Pay

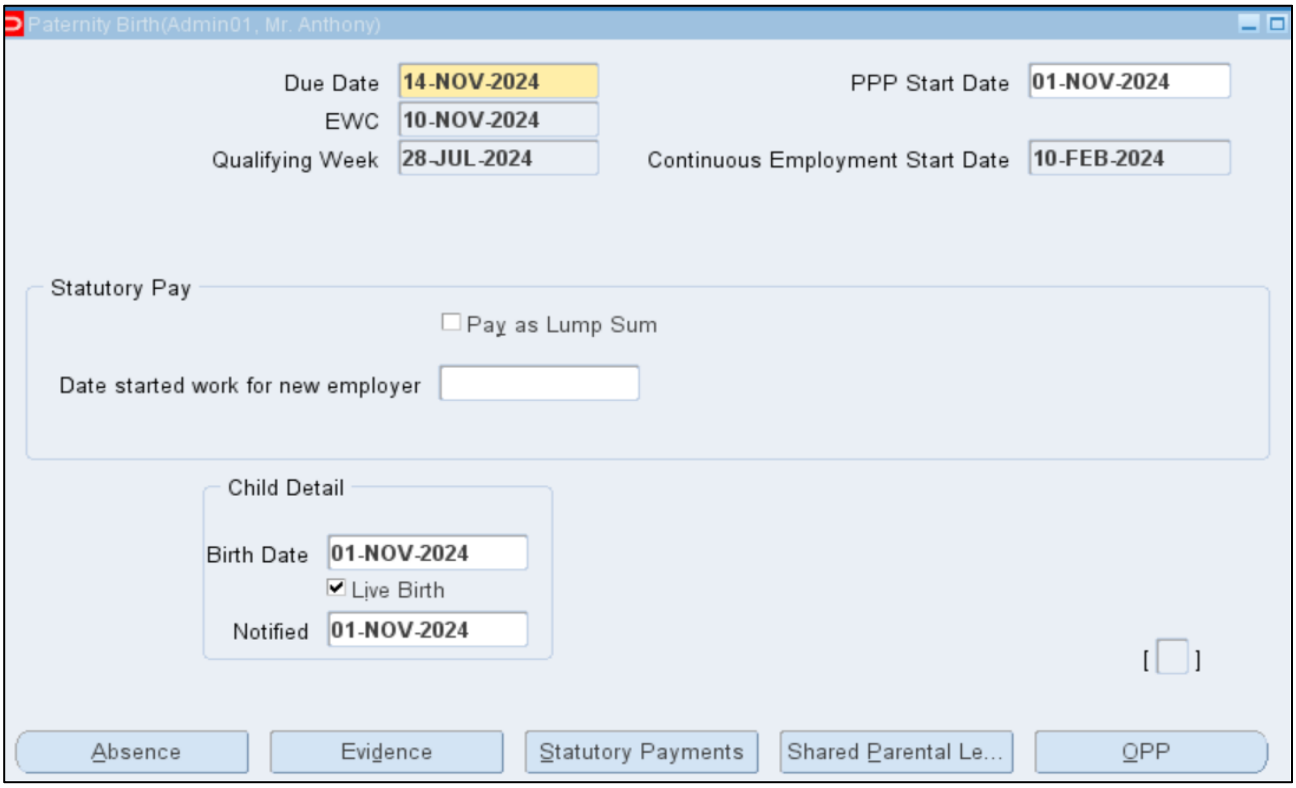
In line with the amendments to Section 15 of NHS T&Cs, the Occupational Paternity Pay solution in ESR has been amended to enable the eligible employees to be automatically paid full pay instead of basic pay for two weeks during the period of Paternity Birth/Paternity Adoption leave. Full pay like the other parental payments, will include notional SPP where the employee qualifies for it.

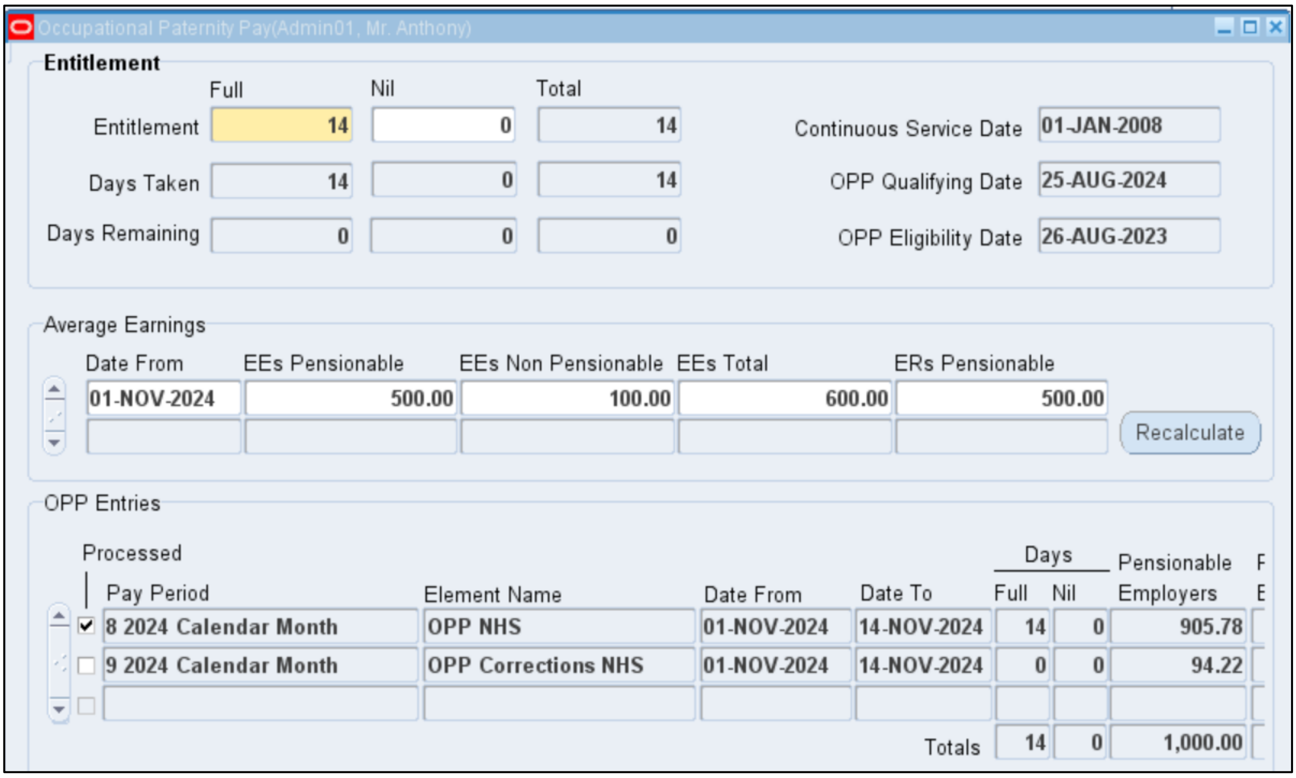
The new OPP processing will be applied for the Paternity Birth/Adoption Absence records created on or after 01-Jan-2025 only.

The Assignment status will need to be changed to Maternity/Adoption on the start date of each period of Paternity leave taken by the employee and reset to Active at the end of each period of Paternity leave taken. This will ensure that only OPP/SPP will be processed for the paternity leave period.

New OPP Form

A new OPP form has been introduced and is made available via a button on Ordinary Paternity Birth/Adoption within Absence module. The new form will provide the relevant information required to identify the entitlement to OPP:





The OPP form will populate the details only when the Ordinary Paternity Birth/Adoption form is completed, and Paternity Birth/Adoption absence record is created.

<u>OPP Entitlement</u>

Where an employee has completed 12 months' continuous service with one or more NHS employers at the beginning of the 11th week before the expected week of childbirth or at the beginning of the week in which they are notified of being matched (OPP Qualifying Date) with a child for adoption will be eligible to receive two weeks of Occupational Paternity Pay at full pay.

The OPP entitlement will be allocated as below:

- For eligible employees, so where the OMP Eligibility Date >= Continuous Service Date, the entitlement will be defaulted to Full - 14 Days, Nil - 0 Days and Total -14 Days.
- For employees not eligible, so where the OMP Eligibility Date < Continuous Service Date, the entitlement will be defaulted to Full-0 Days, Nil - 14 Days and Total - 14 Days

The OPP form allows the ability to make changes to the default entitlement. However, the total days cannot exceed 14 days. An error message will be displayed if the total exceeds 14 days upon saving the details.

Average Earnings

The average weekly earnings will be calculated in a similar manner to how the average earnings are being calculated for OMP/OSHP, this is based on the earnings the employee has received during 8-week period before the qualifying week.

The OPP form will provide the ability for the users to make changes to the average earnings details but the 'Date From' value should not be prior to PPP Start Date. If the Date From value is entered prior to the PPP Start Date, an error message will be displayed

OPP Elements

2 new elements are being introduced to enable the OPP payment to be automatically made for employees during the period of Paternity Brith/Adoption leave:

- OPP NHS
- OPP Corrections NHS

'OPP NHS' element will be created for the allocation of OPP. These elements will be put into the period they apply to unless this is already processed, in which case they will go into the next unprocessed period. The details of OPP Entries with the calculated amounts will be displayed on OPP Form in 'OPP Entries' section.

'OPP Corrections NHS' element will be created in the next available pay period to make the adjustments to the OPP when retrospective changes are made to the Entitlement / Average Earnings on OPP form or any updates made to the Paternity Birth/Adoption Absence record after processing the payment.

In addition, pay elements will be generated for pensionable and non-pensionable pay and arrears elements will be generated for retrospective payments:

OPP PAY NHS

OPP NP PAY NHS

OPP PAY NHS ARS

OPP NP PAY NHS ARS

How the OPP is calculated?

The OPP payment due for the relevant Paternity Birth/Adoption absence period is calculated based on the Average Weekly Earnings populated on OPP form and the OPP Entries will be created in the relevant pay period. The payment due will be recalculated and the OPP entries will be updated if the user overrides the Average Weekly Earnings calculated by the system before the OPP entries are processed.

OPP PAY = (EEs Pensionable /7)*Days Full

OPP NP PAY = (EEs Non Pensionable/7)*Days Full

- Where an employee is in receipt of OPP Full (for Full Days), the SPP will be included in OPP Full pay.
- Where an employee is not eligible for OPP (for Nil Days), the SPP will be paid provided they are eligible for SPP.

Example1:

Employee on Paternity Birth/Adoption from 01-Oct-24 to 14-Oct-2024.

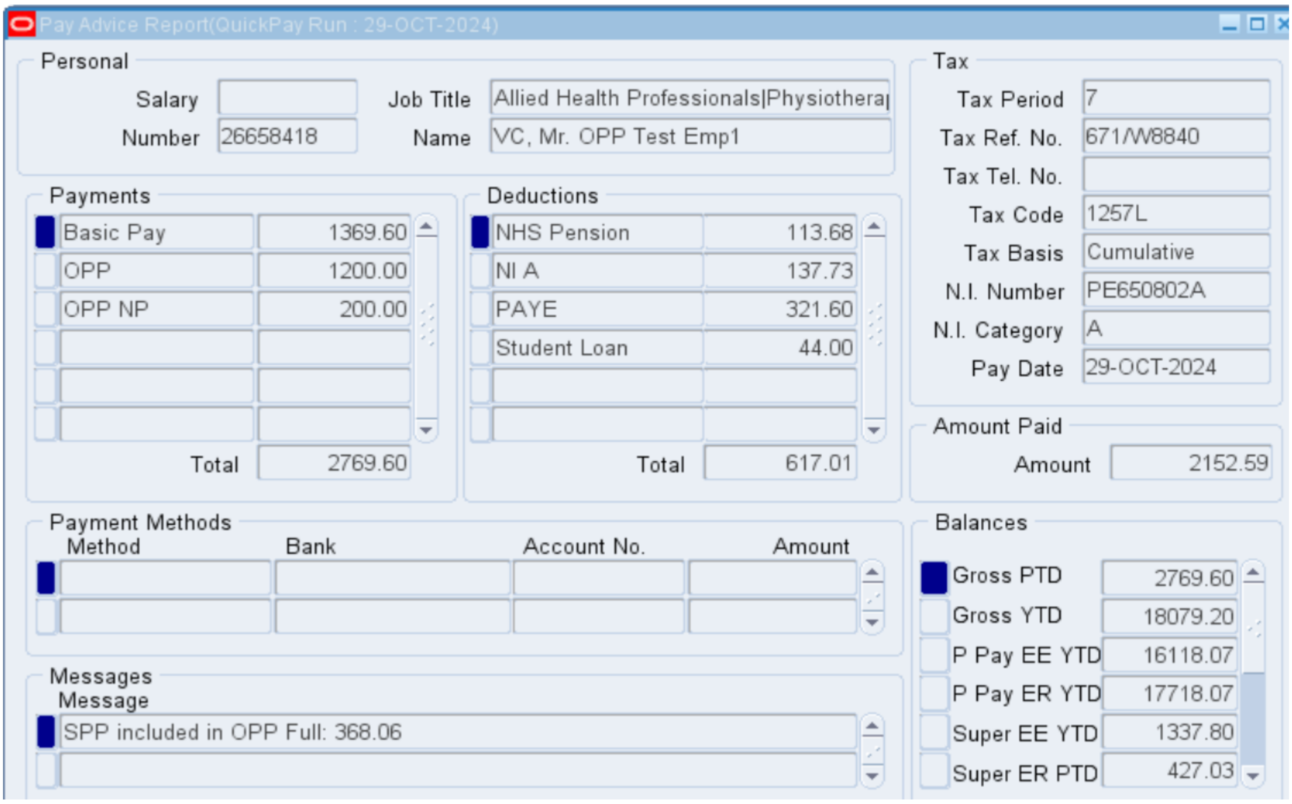
The OPP Eligibility Date >= Continuous Service Date and hence the employee is eligible to receive 14 days of OPP at full pay.

Entitlement:		Full: 14 Days	Nil: 0 Days
Average Earnings	=	£700/Week	£100/Day
Average Earnings Pen	=	£600/Week	£85.71/Day
Average Earnings NP	=	£100/Week	£14.286/Day
Average Earnings Employer	=	£800/ Week	£114.29/ Day

Days Full	14	
Days Nil	0	
EEs Pensionable	14 * (600/7)	= £1200
EEs Non Pensionable	14 * (100/7)	= £200
ERs Pensionable	14 * (800/7)	= £1600
Date From	01-Oct-2024	
Date To	14-Oct-2024	

SPP will be included in the OPP Pay and a message will be shown as below:

SPP included in OPP Full: £368.06



Example 2:

Employee on Paternity Birth/Adoption from 01-Oct-24 to 14-Oct-2024

The OPP Eligibility Date < Continuous Service Date and hence the employee is not eligible to receive the OPP at full pay, but SPP will be paid if eligible.

Paternity Birth/Adoption = 01-Oct-24 to 14-Oct-24 for an employee who is not eligible to receive OPP but eligible for SPP.

Average Earnings	=	£700/Week	£100/Day
Average Earnings Pen	=	£600/Week	£85.71/Day
Average Earnings NP	=	£100/Week	£14.286/Day
Average Earnings Employer	=	£800/ Week	£114.29/ Day

Days Ful	0	
Days Nil	14	
EEs Pensionable	0 * (600/7)	= 0
EEs Non Pensionable	0 * (100/7)	= 0
ERs Pensionable	14 * (800/7)	= £1600
Date From	01-Oct-2024	
Date To	14-Oct-2024	

SPP for 14 Days = £368.06

NOTE:

1. The existing elements for OPP calculation ‘SPP Absence NHS’ and ‘SPP Paid Absence NHS’ should no longer be used for the Paternity Birth/Adoption records created after 01-Jan-2025.
2. If one week of Paternity Adoption is already utilised and 2nd Paternity Birth/Adoption absence is created for the remaining 1 week after 01-Jan-2025, OPP Entries will not be created for the 2nd week although the absence record is created after 01-Jan-2025. In such cases, either ‘SPP Paid Absence NHS’ or ‘SPP Absence NHS’ may be used as applicable.

9 Pay Details Availability Notification

The functionality that sends emails to users when a new payslip becomes available has been extended to cover the production of P60s and P11Ds.

The publishing of P60 and P11Ds pay details will send the emails to users at this point.

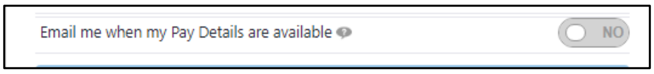
Only users who have already opted in to receiving the payslip emails will receive the P60 and P11D emails.

The option in the My Pay Details portlet:

“Email me when Payslip is available”

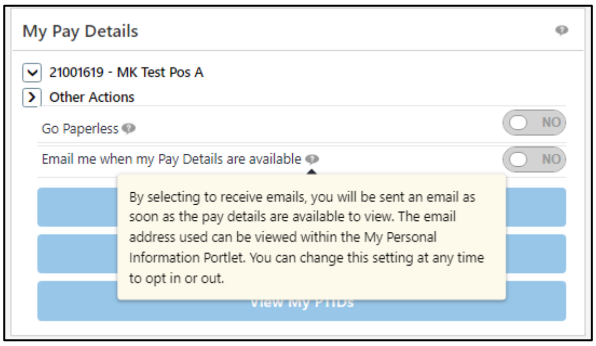
will be renamed to

“Email me when my Pay Details are available”



The hover over text associated with this item will be updated to:

''By selecting to receive emails, you will be sent an email as soon as the pay details are available to view. The email address used can be viewed within the My Personal Information Portlet. You can change this setting at any time to opt in or out.''



The field in ESR BI will be renamed from ‘Payslip Email Enabled’ to 'Pay Details Email Enabled'.

This affects the following subject areas:

- Human Resources - Person EIT Details > EIT Print Pay Details
- Human Resources - Workforce Profile > Employment
- NHS - External Data Integration > Employment

The new emails will mirror the existing ones produced for Payslips.

On publishing of a new P60 the email to the employee will look like this:

Subject: P60 now available.

Body of the Email:

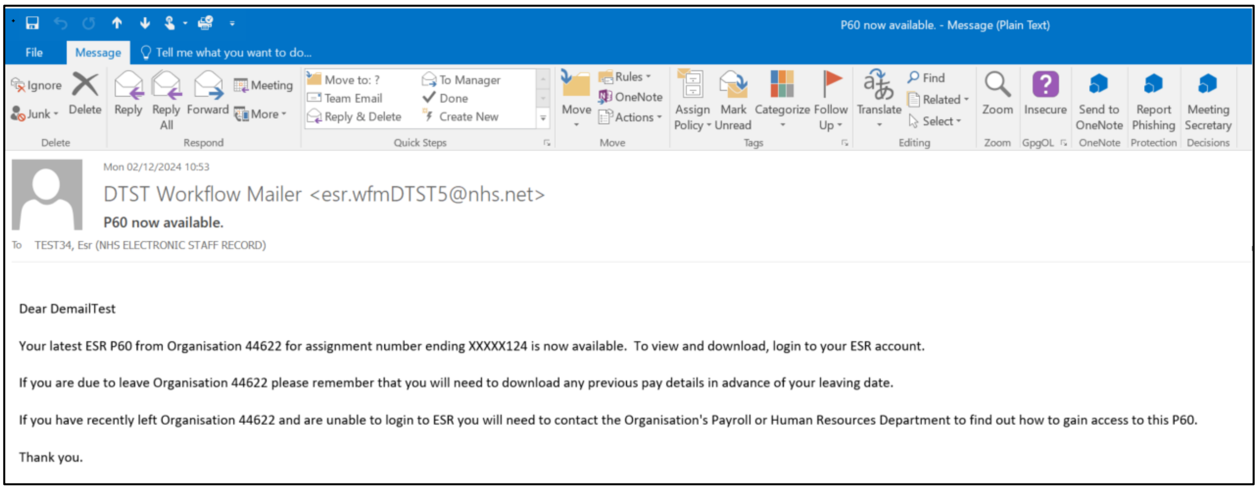
Dear (Insert First Name)

Your latest ESR P60 from (insert Organisation name WITHOUT VPD) for assignment number ending xxxxx678 (mask first five digits of assignment number) is now available. To view and download, login to your ESR account.

If you are due to leave (insert Organisation name WITHOUT VPD) please remember that you will need to download any previous pay details in advance of your leaving date.

If you have recently left (insert Organisation name WITHOUT VPD) and are unable to login to ESR you will need to contact the Organisation's Payroll or Human Resources Department to find out how to gain access to this P60.

Thank you.



On publishing of a new P11D the email to the employee will look like this:

Subject: P11D now available.

Body of the Email:

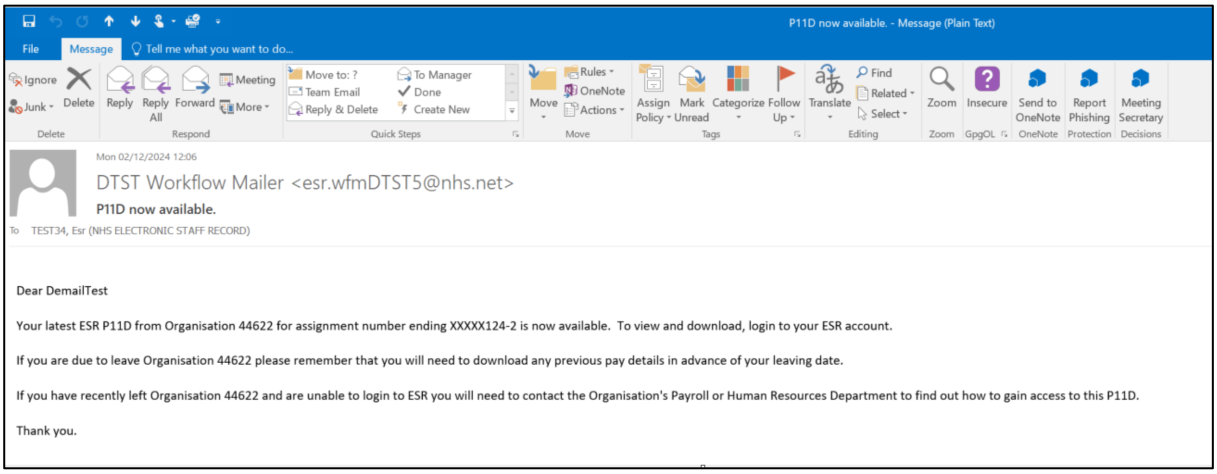
Dear (Insert First Name)

Your latest ESR P11D from (insert Organisation name WITHOUT VPD) for assignment number ending xxxxx678 (mask first five digits of assignment number) is now available. To view and download, login to your ESR account.

If you are due to leave (insert Organisation name WITHOUT VPD) please remember that you will need to download any previous pay details in advance of your leaving date.

If you have recently left (insert Organisation name WITHOUT VPD) and are unable to login to ESR you will need to contact the Organisation's Payroll or Human Resources Department to find out how to gain access to this P11D.

Thank you.



NOTE: The new P60 and P11D emails will be generated for each assignment, where an item for that assignment is published to portal. In some scenarios the same person could get multiple emails where they have multiple assignments with P60s or P11Ds published to Portal at the same time.

10 HMRC Advisory Fuel Rates for 01-DECEMBER-2024

HMRC has published new advisory fuel rates for company cars effective 01 December 2024 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	12p	*11p
1401cc to 2000cc	14p	*13p
Over 2000cc	23p	*21p

Engine Size	Diesel
1600cc or less	11p
1601cc to 2000cc	13p
Over 2000cc	17p

Engine Size	Electric
1400cc or less	7p
Over 1400cc	7p

* 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.