



# ELECTRONIC STAFF RECORD

## RN587 Guide to Enhancements and Changes Release 64.0.0.0 & 64.1.0.0

Information classification: PUBLIC

Revision Date: MARCH 2025

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# 1 **Introduction**

The purpose of this document is to provide details of the enhancements to the ESR system in Release 64.0.0.0 and 64.1.0.0. 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 Legislative Changes for 2025/26

The following changes are required to ensure continued compliance with the UK legislation for the 2025/26 tax year.

### 1. Changes to PAYE Bands & Rates

Note, rate values are not changed for 2025-26 and remain as follows:

Rate	Percentage	Band
Basic Rate	20%	1 to 37,699.99
Higher Rate	40%	37,700 to 125,139.99
Additional Higher Rate	45%	Over 125,140

### 2. Changes to Statutory Payments Rates for 2025/26

SSP rate	SSP rate – £118.75 per week for sickness absences on or after 6 April 2025
SMP standard rate	Increased to £187.18 per week for payment weeks starting on or after 6 April 2025
SAP standard rate	Increased to £187.18 per week for payment weeks starting on or after 6 April 2025
SPP standard rate	Increased to £187.18 per week for payment weeks starting on or after 6 April 2025
ShPP standard rate	Increased to £187.18 per week for payment weeks starting on or after 6 April 2025
SPBP Standard rate	Increased to £187.18 per week for payment weeks starting on or after 6 April 2025

### 3. Changes to Pensions Automatic Enrolment Threshold for 2025/26

The thresholds to be used in the assessment of earnings to determine if an employee should be automatically enrolled, and for calculating qualifying earnings for pension's purposes are unchanged. These will apply for automatic enrolment and re-enrolment.

The rates below are stated for info only and are the same as those held last year.

**Qualifying Earnings Lower Threshold (for assessing jobholder status)**

Annual	6,240.00
Weekly	120.00
Fortnightly (2 weeks)	240.00
Lunar Monthly (4 weeks)	480.00
Calendar Monthly	520.00
Quarterly	1,560.00
Biannual (6 Calendar Monthly)	3,120.00

**Qualifying Earnings Upper Threshold**

Annual	50,270.00
Weekly	967.00
Fortnightly (2 weeks)	1,934.00
Lunar Monthly (4 weeks)	3,867.00
Calendar Monthly	4,189.00
Quarterly	12,568.00
Biannual (6 Calendar Monthly)	25,135.00

**Earnings Trigger for Automatic Enrolment**

Annual	10,000.00
Weekly	192.00
Fortnightly (2 weeks)	384.00
Lunar Monthly (4 weeks)	768.00
Calendar Monthly	833.00
Quarterly	2,499.00
Biannual (6 Calendar Monthly)	4,998.00

**Note:** The Qualifying Trigger for Automatic Enrolment also remains unchanged

#### 4. Changes to Student Loan Threshold for 2025/26

Plan 1	Increased to 26,065 from 06-Apr-2025 (was 24,990)
Plan 2	Increased to 28,470 from 06-Apr-2025 (was 27,265)
Plan 4	Increased to 32,745 from 06-Apr-2025 (was 31,395)

#### 5. Changes to the Postgraduate Loan Threshold for 2025/26

Postgraduate Loan	Remains as 21,000
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#### 6. Scottish Rate of Income Tax changes for 2025/26

The 2025/26 Scottish income tax bandwidths and percentages effective 6 April 2025 are as follows:

Rate	Percentage	Band
Starter Rate	19%	0 to 2,827.99
Basic Rate	20%	2828, to 14,921.99
Intermediate Rate	21%	14,922 to 31,092.99
Higher Rate	42%	31,093 to 62,430
Additional Higher Rate	45%	62,431 to 125,139.99
Top Rate	48%	125,140 and over

The basic personal allowance remains in line with that for rUK, which is £12,570.

**NOTE:** Employers must run the Start of Year process to perform a bulk uplift of tax codes to handle this.

It is not necessary to allocate a tax code to the new Scottish starter rate. The fifth/Top rate introduces tax code SD2:

With this change, the following tax codes apply:

- Basic rate 20% code SBR
- Intermediate rate 21% code SD0
- Higher rate 42% code SD1
- Advanced Rate SD2
- Top rate 48% code SD3

- SBR – all PAYE is calculated using Basic rate, with no tax-free pay allowance.
- SD0 – all PAYE is calculated using Intermediate rate, with no tax-free pay allowance.
- SD1 – all PAYE is calculated using Higher rate, with no tax-free pay allowance.
- SD2 – all PAYE is calculated using Advanced rate, with no tax-free pay allowance.
- SD3 – all PAYE is calculated using Top rate, with no tax-free pay allowance.

**7. Welsh Rate of Income Tax Changes for 2025/26**

The rates from 6th April 2025 will match the rUK for the Tax Year 2025/26

**8. Payrolling of Benefits in Kind**

Each year legislation is passed to update some of the calculations of tax liability, or the rates used in these calculations. Updates are required at the end of each tax year for processing P11Ds. For payrolling of benefits, these same updates are required from the beginning of the tax year 2025/26. The following changes relate to payrolling of Benefits in Kind for 2025/26:

- For 2025-26, the number of Days in the Year is 365, because 2026 is not a leap year
- The multiplier used in calculating the car fuel benefit is unchanged and remains as £28,200. The calculation method is unchanged.
- The multiplier used in calculating the van fuel benefit is unchanged and remains as £769. The calculation method is unchanged.
- The cash equivalent value used to calculate the benefit for a van, which is available for private use, unchanged and remains as £4,020.
- HMRC have published tables to help you select the appropriate percentage for use in the car benefit calculation, based on CO2 emissions. Within the CO2 range 1-50 g/km there are 5 bands which consider the number of miles a zero emissions car can drive on electric power only.
- The diesel supplement remains at 4 percent.
- For zero emission vans, the van benefit will be 'nil' where the van is not capable of producing CO2 emissions. For tax year 2025-26, van benefit charge of £0 will be applied to any zero emission vans.

Rates will be as follows:

Zero Emission rates		
Low	High	Percentage
0	29	14
30	39	12
40	69	8
70	129	5
130	9999	2

Amended from 6 Apr 2025 onwards:

CO2 rates		
Low	High	Percentage
0	0	3
51	54	16
55	59	17
60	64	18
65	69	19
70	74	20
75	79	21
80	84	22
85	89	23
90	94	24
95	99	25
100	104	26
105	109	27
110	114	28
115	119	29
120	124	30
125	129	31
130	134	32
135	139	33
140	144	34
145	149	35
150	154	36
155	159	37
160	164	37
165	169	37
170	9999	37



## 9. Scottish Earnings Arrestments Changes

The Scottish Parliament proposes to make the changes to the rates of Arrestment of Earnings orders effective 06 April 2025. This change affects the existing and new orders.

The latest regulations have the following changes in the rates table effective 06 April 2025:

### Deductions from Weekly Earnings

Net Earnings	Deduction
Not exceeding £172.61	Nil
Exceeding £172.61 but not exceeding £345.22	£2.30 or 15% of earnings exceeding £172.61, whichever is the greater
Exceeding £345.22 but not exceeding £575.37	£25.89 plus 20% of earnings exceeding £345.22
Exceeding £575.37 but not exceeding £863.06	£71.92 plus 25% of earnings exceeding £575.37
Exceeding £863.06	£143.84 plus 50% of earnings exceeding £863.06

### Deductions from Monthly Earnings

Net Earnings	Deduction
Not exceeding £750.00	Nil
Exceeding £750.00 but not exceeding £1,500.00	£10.00 or 15% of earnings exceeding £750.00, whichever is the greater
Exceeding £1,500.00 but not exceeding £2,500.00	£112.50 plus 20% of earnings exceeding £1,500.00
Exceeding £2,500.00 but not exceeding £3,750.00	£312.50 plus 25% of earnings exceeding £2,500.00
Exceeding £3,750.00	£625.00 plus 50% of earnings exceeding £3,750.00

### Deductions from Daily Earnings

Net Earnings	Deduction
Not exceeding £24.66	Nil
Exceeding £24.66 but not exceeding £49.21	£0.33 or 15% of earnings exceeding £24.66, whichever is the greater
Exceeding £49.32 but not exceeding £82.19	£3.70 plus 20% of earnings exceeding £49.32
Exceeding £82.19 but not exceeding £123.29	£10.27 plus 25% of earnings exceeding £82.19
Exceeding £123.29	£20.55 plus 50% of earnings exceeding £123.29

In addition to the updates to the tables for an earnings arrestment, the daily amount of protected earnings which applies to a Current Maintenance Arrestment increases from £21.56 to £24.66. Any employer who operates a CMA should review the element entries and manually update the protected earnings amount as required.

### 10. Statutory Paternity Pay Changes Effective April 2024

For tax year 2024-2025, the following changes to Statutory Paternity Leave and Pay were introduced in ESR effective from April 2024:

- Leave can be taken as a single two-week period of leave or two non-consecutive weeks of leave
- The leave can be taken within a year rather than 56 days

The regulations for these changes cover England, Wales, and Scotland and have not yet been introduced for Northern Ireland.

To enable absences to continue to be processed using the previous rules, a new field “Northern Ireland Employee” is introduced to identify which rules apply to an absence. However, this only applies to employees whose employer’s address is in Northern Ireland and so would NOT apply to ESR. The default to this field is N and therefore there is no need to populate this field, so please keep the field blank.

The new field is present on both Ordinary Paternity Birth and Ordinary Paternity Adoption:

The screenshot shows a software window titled "Paternity Adoption(Smith, Mr. Ben A)". The form contains several input fields: "Expected Placement Date" (with a calendar icon), "Matching Date", "Matching Week", "Actual Placement Date", "PPP Start Date", "Continuous Employment Start Date", and a new field "Northern Ireland Employee" which is highlighted with a red box. Below these fields is a "Statutory Pay" section with a "Pay as Lump Sum" checkbox and a "Date started work for new employer" field. Underneath is a "Child Detail" section with "Birth Date" and "Notified" fields. At the bottom of the window are five buttons: "Absence", "Evidence", "Statutory Payments", "Shared Parental Le...", and "OPP".

Paternity Birth(Smith, Mr. Ben A)

Due Date  ...

EWC

Qualifying Week

PPP Start Date

Continuous Employment Start Date

Northern Ireland Employee

Statutory Pay

Pay as Lump Sum

Date started work for new employer

Child Detail

Birth Date

Live Birth

Notified

[ ]

Absence Evidence Statutory Payments Shared Parental Le... QPP

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### **3 RTI Changes for 2025/26**

Below is an outline of the changes for each version of the Real Time Information (RTI) processes to be used for 2025/26:

#### **NHS RTI Additional FPS XML Process (Terminate Aggregate Assignments) 2024/25**

A new version of the "NHS RTI Additional FPS XML Process (Terminate Aggregate Assignments) 2024/25" has now been made available for users.

In line with HMRC regulations, users will have to submit the 'NHS RTI Additional FPS XML Process (Terminate Aggregate Assignments) 2024/25' for any employee who has had their aggregation status changed to NI & PAYE from 06 April 2025.

This is required so that HMRC are informed that the relevant assignments will no longer be included in a FPS as the employee record has been changed to now be fully aggregated and as such only 1 line will appear in the FPS regardless of the number of assignments processed

#### **NHS RTI FPS XML Process 2025/26 (freq)**

A new version of the "NHS RTI FPS XML Process 2025/26(freq)" has now been made available for users for all payroll frequencies with a payday on or after 06 April 2025 until 05 April 2026.

In line with HMRC's guidance ESR has been enhanced to provide the new RTI FPS process for the new financial year.

This new request includes the following:

- The earliest termination date that can be included in the FPS is 06 April 2019. Users are reminded to ensure that they enter a Final Process/End date when they terminate the employee/assignment record.
- The new Statutory Neonatal Care Pay has been included in the FPS archive, the XML output and the FPS Reconciliation Report in line with HMRC regulations.

In line with HMRC's new requirements, the FPS from 06 April 2025 will include the workplace postcode for any assignments which are on a Freeport or Investment Zone NI Category.

For fully aggregated employees, the FPS archive will now show the complete details on the last processed assignment rather than the last paid assignment.

#### **NHS RTI FPS Reconciliation Report**

This has been updated to include the new statutory payment details for Statutory Neonatal Care Pay. This new column will be named as SNCP.

The existing Nable Pay column has been renamed to Gross Earnings for NIC.

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### **NHS RTI EPS Create Process 2025/26 and NHS RTI EPS XML Process 2025/26**

A new version of both the “NHS RTI EPS Create Process 2025/26” and “NHS RTI EPS XML Process 2025/26” has now been made available for users.

In addition, the EPS has also been updated to include the relevant recovery details for the new Statutory Neonatal Care Pay introduced from 06 April 2025.

### **NHS RTI Year to Date Reconciliation Report Process**

This has been updated to include the new statutory payment details for Statutory Neonatal Care Pay. This new column will be named as SNCP.

The existing Nable Pay column has been renamed to Gross Earnings for NIC.

**NOTE:** The requirements of the Statutory Neonatal Care Pay are still being finalised and will not be included in this release. An interim solution will be delivered over the weekend commencing 4<sup>th</sup> April 2025, details of how this will work will be provided nearer to the release weekend.

### **NHS RTI FPS Amendments XML Process 2024/25**

ESR has been updated to allow users to inform HMRC of any changes to an employee’s details as required for 2024/25 after the close of the financial year, in line with HMRC regulations.

In addition, the following guidance may be helpful:

For employees with NI only aggregation, who have had a change to the NI Reporting Assignment during 2024/25, the in-year FPS will correctly split the year to date NI details between the NI Reporting Assignments used as per HMRC’ requirements. However, the FPS Amendments cannot record this, so it will move all of the year to date NI details to the final NI Reporting Assignment used for the year and will clear down the NI details previously reported on the other NI Reporting Assignments used during 2024/25.

### **Rules to Report Balance Adjustments**

To report balance adjustments in the Amended FPS process, the adjustments must be performed meeting the following conditions:

1. The balance adjustment date must be on the last payday processed for the relevant assignment during 2024/25.
2. The balance adjustment must be no earlier than the start of the new tax year for which the YTD balances are to be updated e.g. effective date for the balance adjustment must be no later than 05-Apr-25

Further guidance can be found in the [FPS Amendments Process](#) User Manual topic.

## 4 National Insurance Changes for 2025/26

### Special Tax Site NICs Relief – Workplace Postcode

HMRC have introduced a new reporting requirement for Freeport and Investment Zone employers who claim the NICs reliefs to provide a workplace postcode. From 06 April 2025, HMRC will reject an FPS if a Freeport or Investment Zone NIC category letter is reported for an employment but does not contain the workplace postcode for any of the qualifying employees.

The workplace postcode for any of the qualifying employee must be located within a designated special tax site. To accommodate this requirement, beginning 06 April 2025, a new field will be introduced in the NI element to allow employers to record the worksite postcode for qualifying employees working in an “Investment Zone” or “Freeport Zone”.

The tax information form has been updated. To allow the entry of the postcode, a new field “Special Tax Site Work Postcode” has been added to all active assignments.

The screenshot shows a software window titled "Statutory Details(Smith01, Mr. Ben)". At the top, there are input fields for "NI Number" (AB508112B), "Date of Birth" (01-JAN-1970), and "Age" (55). Below these are three checkboxes: "NI Multiple Assignments" (checked), "PAYE Aggregated Assignments" (unchecked), and "Exclude From WNU" (unchecked). A tabbed interface shows "PAYE Details", "NI Details" (selected), "New Starter (RTI)", "RTI Aggregation", and "New Starter (Pre-RTI)". The "NI Details" tab contains several fields: "NI Category" (A), "Certificate" (Not Applicable), "Date of Renewal", "Pension" (Not contracted out), "Period Type", "Period", "Process Type" (Normal), "SCON", "Freeport Eligibility End Date", "Investment Zone Eligibility End Date", "First Civilian Employment Start Date", and a newly added "Special Tax Site Work Postcode" field which is highlighted with a red border. At the bottom, there are checkboxes for "Director Indicator" and "Pension Indicator", and an "Effective Dates" section with "From" (01-JUN-2015) and "To" fields.

However, the actual postcode details will have to be added manually for any assignments which on either the Investment Zones or Freeport NI categories. These are N, E, K, D, F I S and L effective from 06 April 2025. To find out if you have any assignments on these NI categories, please check your latest Gross to Net report for each payroll as this displays the employee’s NI by NI category. For any assignment on these NI categories, you need to ensure you have added the work site postcode before you run your week 1/month 1 payroll run, otherwise the process will return an error for the assignments due to the following validations.

Validations

The following new validations have been applied to the Tax Information form, along with the existing validations:

1. Special Tax Site Postcode is required for employees working in a Freeport.
2. Special Tax Site Postcode is required for employees working in Investment Zones.
3. A valid postcode must be entered in the Special Tax Site Work Postcode field.

**Married Ladies Reduced Rate NI Categories – New Age Validations**

As per HMRC’s guidance ESR has been updated to include new age related validations for any assignments which are on the Married Ladies NI categories.

Tax Information Form Validations

The following new validations are performed while adding NI element to the entries along with existing validations:

- The NI Category cannot be B or E or I, if the Date of Birth is after 05 Apr 1961.

New Payroll Level Validation Messages:

Invalid NI category. The NI Category cannot be B or E or I, if the Date of Birth is after 05 Apr 1961

**Changes to Thresholds / Rates**

The following changes are required to ensure continued compliance with the UK legislation for the 2025/26 tax year.

The earnings thresholds are as follows:

	ST	LEL	PT	UST	FUST	IZUST	VUST	AUST	UEL
Weekly	£96	£125	£242	£967	£481	£481	£967	£967	£967
Monthly	£417	£542	£1048	£4189	£2083	£2083	£4189	£4189	£4189
Yearly	£5000	£6500	£12570	£50270	£25000	£25000	£50270	£50270	£50270

- The PT, UST, and UEL threshold values remain unchanged until April 2028. However, the Lower Earnings Limit is increased and the Secondary Threshold is reduced for tax year 2025/26 and will then remain unchanged at this rate until April 2028 (may be subject to a change later).
- The percentages used to calculate employee contributions are unchanged for 2025/26.
- The percentage used to calculate employer contributions is increased to 15% from 13.8%.

**New Elements**

The following new elements have been added to ESR. They only process when the assignment is over the ST for NI:

Gross Earnings Calculations for FPS

This is an information element that is used to ensure the calculation of the NI is accurate following the reduction of the ST as detailed above. As this is an indirect element, users can only see this element in the run results.

The input values are as follows:

<b>NI Category</b>	NI category for the assignment
<b>Nlable Pay</b>	Nlable earnings in the period of the assignment
<b>Secondary Threshold</b>	Current ST value (see above)

The Nlable Pay is the total processed for the period so far. This means it will be the total amount for all assignments if the employee is aggregated. Also if there are multiple payroll runs in the period, this value will be increased to the total of the amount processed for all assignments across the period.

Gross Earnings for FPS

This is an information element that is used to ensure the correct Nlable earnings are included in the FPS. This is used for any NI category without a defined age requirement. As this is an indirect element, users can only see this element in the run results.

The input value is as follows:

<b>NI *</b>	Nlable earnings in the period of the assignment
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\* = the NI category for the assignment. This is currently restricted to the following NI categories – NI A, NI B, NI D, NI E, NI F, NI I, NI J, NI L, NI N, and NI V



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As per the above element's Nlable Pay input value, the amount shown will the total in the period so far as per the employee's aggregation status and how many payroll runs have been processed in the period.

Gross Earnings for FPS Age Based

This is an information element that is used to ensure the correct Nlable earnings are included in the FPS. This is used for any NI category with a defined age requirement. As this is an indirect element, users can only see this element in the run results.

The input value is as follows:

NI *	Nlable earnings in the period of the assignment
------	---

\* = the NI category for the assignment. This is currently restricted to the following NI categories – NI C, NI H, NI K, NI M, NI S, and NI Z

As per the above element's Nlable Pay input value, the amount shown will the total in the period so far as per the employee's aggregation status and how many payroll runs have been processed in the period.

**New Balances**

Gross Earnings for FPS NI \*

\* = the NI category for the assignment.

This is fed by the above elements (Gross Earnings for FPS and Gross Earnings for FPS Age Based) for the following NI categories – NI A, NI B, NIC, NI D, NI E, NI F, NI I, NI J, NI L, NI M, NI N, NI S, NI V, and NI Z

## 5 **NHS Pension Scheme Contribution Threshold Changes from 1 April 2025**

With effect from 01 April 2025 the NHS Pension Scheme Contribution Thresholds have been updated as follows:

Tier	Range	Percentage	Effective Date From
1 (A)	*£0.00 to £13,259.99	5.2	01-Apr-24
2 (B)	£13,260.00 to £27,288.99	6.5	01-Apr-25
5 (E)	£27,289.00 to £33,247.99	8.3	01-Apr-25
7 (G)	£33,248.00 to £49,913.99	9.8	01-Apr-25
8 (H)	£49,914.00 to £63,994.99	10.7	01-Apr-25
10 (J)	£63,995.00 to £999999.99	12.5	01-Apr-25

\* No change has been made to this threshold. This is stated for information only.

### **Reporting**

Existing Pension Banding Reporting within the NHS Pension Dashboard in ESRBI will be updated to reflect the updated thresholds.

## **6 Changes to the P46 (Car) for 2025/26**

In line with HMRC's requirements a new concurrent programme has been created for the P46 (Car) for 2025/26, NHS P46 (Car) Archive Process 2025/26.

This process should be used for any car benefit where the reportable benefit is due during 2025/26. If the reportable benefit is due during 2024/25, then the NHS P46 (Car) Archive Process 2024/25 should be used..

## 7 Change to Allow Payrolling of Benefits of Benefits in Kind for Assets Transferred and Assets Made Available

The GB BIK Assets Transferred and the GB BIK Assets at Emp Disposal have been introduced into ESR with an effective date of 17-Mar-2025.

These elements should be used in lieu of the Payrolled Benefits NHS element to report the appropriate benefit to HMRC via the FPS.

Since the benefit is added to the Taxable pay then the benefit will also be reported on the P60 and the P45.

The **GB BIK Assets Transferred** has the following input values:

Input Value	Description
Description	Free text to describe asset
Asset Type	LOV consisting of Cars, Multiple, Other, Precious Metals, Property
Cost of Market Value	Number (mandatory)
Amount Made Good	Number (optional)

**NOTE:** If OpRA rules apply, then:

- The appropriate amount must be entered in the field Cost or Market Value to report the Asset Cost taxable.
- The higher of the Asset Cost and the amount of Cash Foregone must be entered.

The 'Cost of Market Value' input value is mandatory and this value, reduced by the value, where populated, in the 'Amount Made Good' input value, will be used to calculate the benefit. This benefit will then be spread across all remaining periods in the tax year and added to the Taxable Pay.

This element will automatically feed through to the Class 1A NIC balance and so there is no need to make any adjustments to that balance when using this element (as is done for Payrolled Benefits NHS)

The element should be end dated at the end of the tax year, as is currently done for the GB BIK Car and Car Fuel. The element will automatically end at the last standard process date for terminations, and all of the benefit remaining will be processed in that period.

Where there are late notification of leavers then this will be picked up by setting the 'Run BIK Late Leaver Process' parameter to Yes as part of the NHS Payroll Run. This can be checked by running the NHS BIK Late Leavers Adjustment Process (Monthly).

Please note that the element will also be included in the NHS BIK Validation Report (freq).

**Element Entries: 06-APR-2025(Smith, Mr. Ben)**

Period: 1 2025 Calendar Month (01-APR-2025 to 30-APR-2025)  
 Classification: [Empty]

Element Name	Processing Type
Basic Contracted NHS	Recurring
Enhanced Multipliers NHS	Recurring
NI	Recurring
Negative Net Pay NHS	Recurring
Overtime Multipliers NHS	Recurring
PAYE Details	Recurring
Pension NHS	Recurring
Pensions Information	Recurring
SSP SMP Calculator NHS	Recurring
Standard Costing NHS	Recurring
<b>GB BIK Assets Transferred</b>	Recurring

Buttons: Entry Values, Balance Grossup

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**Entry Values: 06-APR-2025(Smith, Mr. Ben)**

Description: Laptop  
 Asset Type: Other  
 Cost or Market Value: 1000.00  
 Amount Made Good: 100.00  
 Pay Value: [Empty]

Further Entry Information:

Date Earned: [Empty]  
 Original Date Earned: [Empty]  
 Payee Details: [Empty]  
 Processing Priority: 5300  
 Show Adjustment

Dates: [Table with 2 columns: From, To]

The above example would calculate at  $1000 - 100 = 900 / 12$  remaining periods = 75, which would be added to their taxable pay each period.

The **GB BIK Assets at Emp Disposal** has the following input values:

**Element Entries: 17-MAR-2025(Smith01, Mr. Ben)**

Period: 12 2025 Calendar Month (01-MAR-2025 to 31-MAR-2025)  
 Classification: [Empty]

Element Name	Processing Type
Basic Contracted NHS	Recurring
Enhanced Multipliers NHS	Recurring
NI	Recurring
Negative Net Pay NHS	Recurring
Overtime Multipliers NHS	Recurring
PAYE Details	Recurring
Pensions Information	Recurring
SSP SMP Calculator NHS	Recurring
Standard Costing NHS	Recurring
Pension NHS	Recurring
<b>GB BIK Assets at Emp Disposal</b>	Recurring

Buttons: Entry Values, Balance Grossup

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**Entry Values: 17-MAR-2025(Smith01, Mr. Ben)**

Assets: [Empty]  
 Asset Description: [Empty]  
 Cost to You: [Empty]  
 Amount Made Good: [Empty]  
 Pay Value: [Empty]  
 Annual Value: [Empty]  
 Benefit Start Date: [Empty]  
 Benefit End Date: [Empty]

Further Entry Information:

Date Earned: [Empty]  
 Original Date Earned: [Empty]  
 Payee Details: [Empty]  
 Processing Priority: 5300  
 Show Adjustment

Dates: [Table with 2 columns: From, To]

Input Value	Description
Assets	LOV consisting of Aircraft, Boat, Corporate Hospitality, Holiday accommodation, multiple, Other, Timeshare Accommodation
Asset Description	Free text to describe asset
Cost to You	Number, Optional
Amount Made Good	Number
Annual Value	Number, Optional
Benefit Start Date	Date, Optional/Mandatory if Annual Value entered
Benefit End Date	Date, Optional/Mandatory if Annual Value entered

**NOTE:** If OpRA rules apply, then:

- The appropriate amount must be entered in the field Cost to You to report the Asset Cost taxable.
- The higher of the Asset Cost and the amount of Cash Foregone must also be entered.

Depending on the business requirements, a value must be entered either against Cost to You **or** Annual Value. If Annual Value input value is entered, then Benefit Start Date and Benefit End Date input values must also be entered. An example of how the benefit is calculated where the Annual Value is entered can be seen below.

Where the 'Cost to You' input value is entered, then this is reduced by the value, where populated, in the 'Amount Made Good' input value, and used to calculate the benefit. This benefit will then be spread across all remaining periods in the tax year, and added to the Taxable Pay.

Example case where there are 365 P11D days in the year.

Element: **GB BIK Assets at Emp Disposal**

Element attached on 6 April 2025

Payroll Frequency: Monthly

Input values:

Annual Value = 900

Benefit Start Date = 06-Apr-2025

Benefit End Date = 05-Apr-2026

April Payroll Run:

Cash Equivalent = Annual Value/ P11D\_DAYS\_IN\_YEAR\* (Benefit End Date – Benefit Start Date +1) =

---

$$900/365*365 = 900$$

$$\text{Already Payrolled Amount} = 0$$

$$\text{Remaining amount} = 900 - 0 = 900$$

$$\text{Total number of remaining periods} = 12$$

$$\text{Prorate cash equivalent for April} = 900 / 12 = 75$$

#### May Payroll Run:

$$\text{Cash Equivalent} = \text{Annual Value} / \text{P11D\_DAYS\_IN\_YEAR} * (\text{Benefit End Date} - \text{Benefit Start Date} + 1) =$$

$$900/365*365 = 900$$

$$\text{Already Payrolled Amount} = 75$$

$$\text{Remaining amount} = 900 - 75 = 825$$

$$\text{Total number of remaining periods} = 11$$

$$\text{Prorate cash equivalent for May} = 825 / 11 = 75$$

#### June Payroll Run:

$$\text{Cash Equivalent} = \text{Annual Value} / \text{P11D\_DAYS\_IN\_YEAR} * (\text{Benefit End Date} - \text{Benefit Start Date} + 1) =$$

$$900/365*365 = 900$$

$$\text{Already Payrolled Amount} = 150$$

$$\text{Remaining amount} = 900 - 150 = 750$$

$$\text{Total number of remaining periods} = 10$$

$$\text{Prorate cash equivalent for Jun} = 750 / 10 = 75$$

At the end of Jun 2025, a new Annual Value of 1000 to take effect from 1-Jul-25, is announced. The element is updated such that the existing entry now has a Benefit End Date of 30-Jun-2025, and saved as a correction.

Then, as a date track update, the Benefit Start Date is amended to 01-Jul-2025 (note the date track update must match the Benefit Start Date), the Benefit End Date to be 5-Apr-26, and the Annual Value is also amended to be 1000.

#### July Payroll Run:

$$\text{Cash Equivalent} = \text{Prorated Annual Value for Apr-Jun} + \text{Prorated Annual Value for Jul-Apr} =$$

$$900/365 * (\text{Days Between}(06\text{-Apr-2024}, 30\text{-Jun-2024}) + 1) + 1000/365 * (\text{Days Between}(01\text{-Jan-2025}, 05\text{-Apr-2025}) + 1)$$

---

$$= 900/365*(86) + 1000/365*(279)$$

$$= 212.05 + 764.38 = 976.43$$

Already Payrolled Amount = 225

$$\text{Remaining amount} = 976.43 - 225 = 751.43$$

Total number of remaining periods = 9

$$\text{Prorate cash equivalent for Jul} = 751.43 / 9 = 83.49$$

**NOTE:** The element will begin processing as soon as it is added to the assignment, regardless of whether the Benefit Start Date has yet passed but will use the Benefit Start Date and Benefit End Date to work out the value of the Benefit.

As is currently done for the GB BIK Car and Car Fuel, users should end date the element at the end of the tax year.

This element will automatically feed through to the Class 1A NIC balance and so there is no need to make any adjustments to that when using this element.

Where there are late notification of leavers then this will be picked up by setting the 'Run BIK Late Leaver Process' parameter to Yes as part of the NHS Payroll Run. This can also be checked by running the NHS BIK Late Leavers Adjustment Process (Monthly).



## 8 HMRC Advisory Fuel Rates for 01-MARCH-2025

HMRC has published new advisory fuel rates for company cars effective 01 March 2025 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	15p	*13p
Over 2000cc	*23p	*21p

Engine Size	Diesel
1600cc or less	12p
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.

## **9 National Minimum Wage and National Living Wage Changes from 1 April 2025**

ESR has been updated to reflect the revised National Minimum/Living Wage values from 1 April 2025, as follows:

<b>Category</b>	<b>Rate from 01-APR-25</b>
Under 18	7.55
18 to 20	10.00
21 and 22	12.21
Apprentice	7.55
Living Wage now includes 21 and above	12.21

The above rates will be used in the following:

- NHS Payroll Message Report
- Payroll Exceptions Management tool

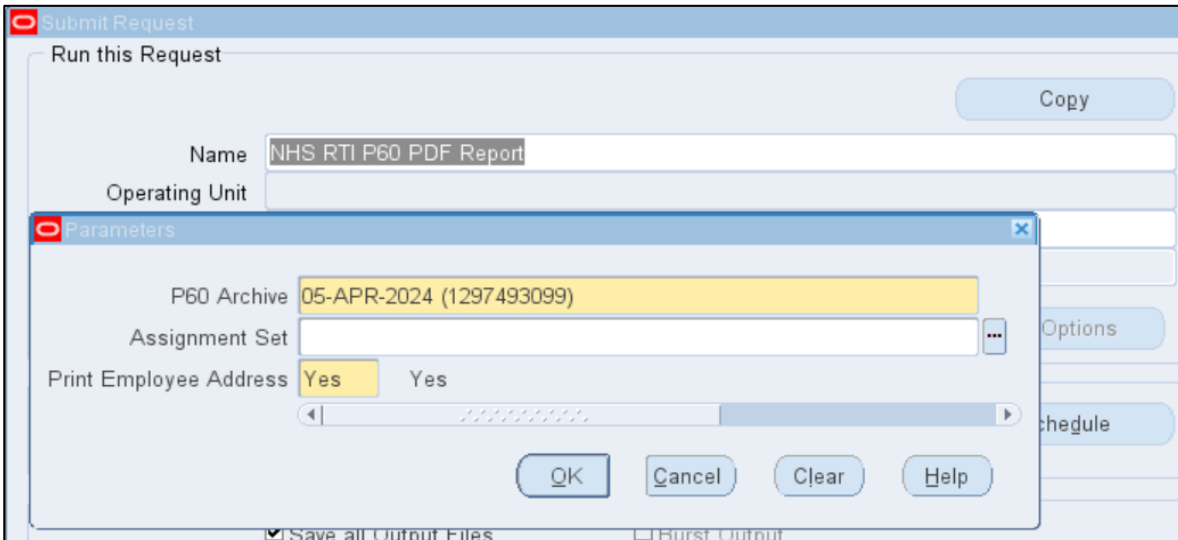
The messages displayed in the Payroll Exceptions Management tool have been amended to reflect these changes and all NLW/NMW exceptions are mandatory.

## 10 Amendment to P60 Processing

The P60 processing for 2024/25 has been updated to reflect the current year.

### New NHS RTI P60 PDF Report

A new concurrent program 'NHS RTI P60 PDF Report' has been introduced to produce the P60s in a printable PDF format:



The new concurrent program will have the following parameters:

#### **P60 Archive**

This is a mandatory parameter, and a value must be selected from the List of Values which will contain the P60 Archives available.

#### **Assignment Set**

This is an optional parameter that will enable organisations to produce P60s in PDF format for a selection of assignments, from a previously created Assignment Set, to enable emailing or local printing. Clicking on the List of Values will provide the list of available assignment sets.

#### **Print Employee Address**

This is a mandatory parameter, and will be defaulted to 'Yes' which will enable the employee's home address to be printed on the P60. If 'No' is selected, the employee's home address will not be printed on P60.

The new program will submit the 'RTI - Year End P60 Report Process' which will produce the output in PDF format which can be emailed or printed locally on plain paper. The PDF output will contain the P60s for all employees in the selected P60 Archive. If an Assignment Set has been selected, only the output for those in the Assignment Set will be produced.

The new program can be used to generate P60s for employees involved in a MOCP. To generate the MOCP P60s, the MOCP assignment set that is created as part of the MOCP process should be selected.

The new concurrent program will be available to run from the following URPs:

- XXX Payroll Administration
- XXX Payroll Super Administration

The existing concurrent program 'NHS RTI P60 Report Process' which was used to produce P60 print file for central printing has been disabled as this is no longer required.

The existing concurrent program 'NHS RTI MOCP P60 Process' has been amended to only submit 'NHS RTI P60 Reconciliation Report' to produce the P60 Reconciliation Report for MOCP employees. This process no longer submits 'NHS RTI MOCP P60 Print File' process.

# 11 Uplift of Union Rates for UNITE

The following rate changes have been applied to Union Deductions Rates Table.

Union	Fund	Old Value	New Value	New Effective Date
<b>TGWU</b>	Part Time Youth Monthly	9.53	<b>10.27</b>	<b>01-Apr-25</b>
	Part Time Youth Weekly	2.20	<b>2.37</b>	<b>01-Apr-25</b>
	T&G Care Extra Monthly	17.20	<b>18.16</b>	<b>01-Apr-25</b>
	T&G Care Extra Weekly	3.97	<b>4.19</b>	<b>01-Apr-25</b>
	T&G Care Monthly	15.90	<b>16.86</b>	<b>01-Apr-25</b>
	T&G Care Weekly	3.67	<b>3.89</b>	<b>01-Apr-25</b>
	T&G Part Time Monthly	10.18	<b>10.92</b>	<b>01-Apr-25</b>
	T&G Part Time Weekly	2.35	<b>2.52</b>	<b>01-Apr-25</b>
<b>AMICUS</b>	Core + Ancillary Full Time Monthly	17.20	<b>18.16</b>	<b>01-Apr-25</b>
	Core + Ancillary Full Time Weekly	3.97	<b>4.19</b>	<b>01-Apr-25</b>
	Core + Ancillary Part Time Monthly	10.18	<b>10.92</b>	<b>01-Apr-25</b>
	Core + Ancillary Part Time Weekly	2.35	<b>2.52</b>	<b>01-Apr-25</b>
	Full Time Monthly	15.90	<b>16.86</b>	<b>01-Apr-25</b>
	Full Time Opt Out Monthly	15.04	<b>15.95</b>	<b>01-Apr-25</b>
	Full Time Opt Out Weekly	3.47	<b>3.68</b>	<b>01-Apr-25</b>
	Full Time Weekly	3.67	<b>3.89</b>	<b>01-Apr-25</b>
	Part Time Monthly	9.53	<b>10.27</b>	<b>01-Apr-25</b>
	Part Time Opt Out Monthly	9.02	<b>9.72</b>	<b>01-Apr-25</b>
	Part Time Opt Out Weekly	2.08	<b>2.24</b>	<b>01-Apr-25</b>
	Part Time Weekly	2.20	<b>2.37</b>	<b>01-Apr-25</b>
	Training - 1st Year Monthly	3.47	<b>3.68</b>	<b>01-Apr-25</b>
	Training - 1st Year Weekly	0.80	<b>0.85</b>	<b>01-Apr-25</b>
<b>UCATT</b>	Full Time Monthly	17.20	<b>18.16</b>	<b>01-Apr-25</b>
	Full Time Opt Out Monthly	15.90	<b>16.86</b>	<b>01-Apr-25</b>

	Full Time Opt Out Weekly	3.67	<b>3.89</b>	<b>01-Apr-25</b>
	Full Time Weekly	3.97	<b>4.19</b>	<b>01-Apr-25</b>
	Juvenile Opt Out Monthly	15.90	<b>16.86</b>	<b>01-Apr-25</b>
	Juvenile Opt Out Weekly	3.67	<b>3.89</b>	<b>01-Apr-25</b>
<b>UNITE</b>	Basic Full Time > 01/03/18 + Political Monthly	16.33	<b>17.29</b>	<b>01-Apr-25</b>
	Basic Full Time > 01/03/18 + Political Weekly	3.77	<b>3.99</b>	<b>01-Apr-25</b>
	Basic Part Time > 01/03/18 + Political Monthly	9.96	<b>10.70</b>	<b>01-Apr-25</b>
	Basic Part Time > 01/03/18 + Political Weekly	2.30	<b>2.47</b>	<b>01-Apr-25</b>
	Enhanced Full Time > 01/03/18 + Political Monthly	17.63	<b>18.59</b>	<b>01-Apr-25</b>
	Enhanced Full Time > 01/03/18 + Political Weekly	4.07	<b>4.29</b>	<b>01-Apr-25</b>
	Enhanced Part Time > 01/03/18 + Political Monthly	10.61	<b>11.35</b>	<b>01-Apr-25</b>
	Enhanced Part Time > 01/03/18 + Political Weekly	2.45	<b>2.62</b>	<b>01-Apr-25</b>
	Low Pay Basic > 01/03/18 + Political Monthly	10.40	<b>11.05</b>	<b>01-Apr-25</b>
	Low Pay Basic > 01/03/18 + Political Weekly	2.40	<b>2.55</b>	<b>01-Apr-25</b>
	Low Pay Basic > 01/03/18 No Political Monthly	9.97	<b>10.62</b>	<b>01-Apr-25</b>
	Low Pay Basic > 01/03/18 No Political Weekly	2.30	<b>2.45</b>	<b>01-Apr-25</b>
	Low Pay Enhanced > 01/03/18 + Political Monthly	11.70	<b>12.35</b>	<b>01-Apr-25</b>
	Low Pay Enhanced > 01/03/18 + Political Weekly	2.70	<b>2.85</b>	<b>01-Apr-25</b>
	Low Pay Enhanced > 01/03/18 No Political Monthly	11.27	<b>11.92</b>	<b>01-Apr-25</b>

	Low Pay Enhanced > 01/03/18 No Political Weekly	2.60	<b>2.75</b>	<b>01-Apr-25</b>
	Apprentice Year 1 Basic < 01/03/18 Monthly	3.47	<b>4.98</b>	<b>01-Apr-25</b>
	Apprentice Year 1 Basic < 01/03/18 Weekly	0.80	<b>1.15</b>	<b>01-Apr-25</b>
	Apprentice Year 1 Basic > 01/03/18 Monthly	3.90	<b>5.41</b>	<b>01-Apr-25</b>
	Apprentice Year 1 Basic > 01/03/18 Weekly	0.90	<b>1.25</b>	<b>01-Apr-25</b>
	Apprentice Year 2 Basic < 01/03/18 Monthly	6.80	<b>8.54</b>	<b>01-Apr-25</b>
	Apprentice Year 2 Basic < 01/03/18 Weekly	1.57	<b>1.97</b>	<b>01-Apr-25</b>
	Apprentice Year 2 Basic > 01/03/18 Monthly	7.23	<b>8.97</b>	<b>01-Apr-25</b>
	Apprentice Year 2 Basic > 01/03/18 Weekly	1.67	<b>2.07</b>	<b>01-Apr-25</b>
	Apprentice Year 3 Basic < 01/03/18 Monthly	9.88	<b>11.83</b>	<b>01-Apr-25</b>
	Apprentice Year 3 Basic < 01/03/18 Weekly	2.28	<b>2.73</b>	<b>01-Apr-25</b>
	Apprentice Year 3 Basic > 01/03/18 Monthly	10.31	<b>12.26</b>	<b>01-Apr-25</b>
	Apprentice Year 3 Basic > 01/03/18 Weekly	2.38	<b>2.83</b>	<b>01-Apr-25</b>
	Apprentice Year 4 Basic < 01/03/18 Monthly	13.00	<b>15.17</b>	<b>01-Apr-25</b>
	Apprentice Year 4 Basic < 01/03/18 Weekly	3.00	<b>3.50</b>	<b>01-Apr-25</b>
	Apprentice Year 4 Basic Monthly > 01/03/18	13.43	<b>15.60</b>	<b>01-Apr-25</b>
	Apprentice Year 4 Basic > 01/03/18 Weekly	3.10	<b>3.60</b>	<b>01-Apr-25</b>
	Basic Full Time DriverCare + DT < 01/03/18 Monthly	20.66	<b>21.62</b>	<b>01-Apr-25</b>

	Basic Full Time DriverCare + DT < 01/03/18 Weekly	4.77	<b>4.99</b>	<b>01-Apr-25</b>
	Basic Full Time DriverCare + DT > 01/03/18 Monthly	21.09	<b>22.05</b>	<b>01-Apr-25</b>
	Basic Full Time DriverCare + DT > 01/03/18 Weekly	4.87	<b>5.09</b>	<b>01-Apr-25</b>
	Enhanced Full Time DriverCare + DT < 01/03/18 Monthly	21.96	<b>22.92</b>	<b>01-Apr-25</b>
	Enhanced Full Time DriverCare + DT < 01/03/18 Weekly	5.07	<b>5.29</b>	<b>01-Apr-25</b>
	Enhanced Full Time DriverCare + DT > 01/03/18 Monthly	22.39	<b>23.35</b>	<b>01-Apr-25</b>
	Enhanced Full Time DriverCare + DT > 01/03/18 Weekly	5.17	<b>5.39</b>	<b>01-Apr-25</b>

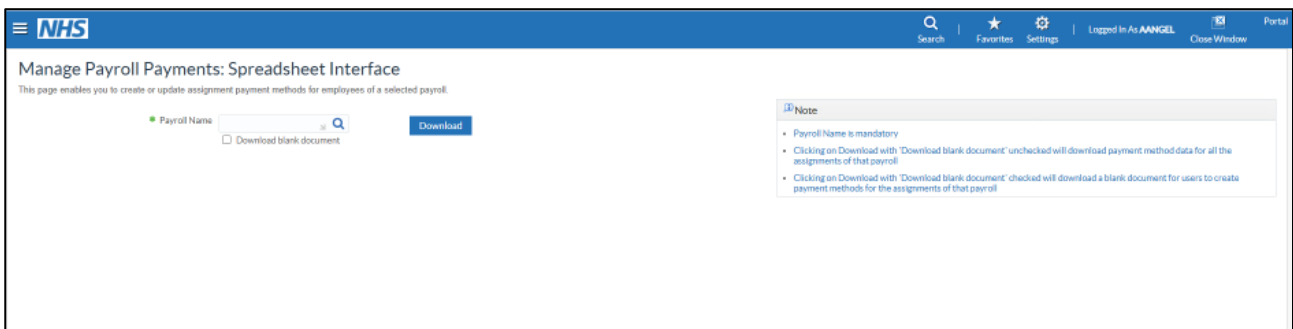


## 12 Mass Update to Personal Payment Methods

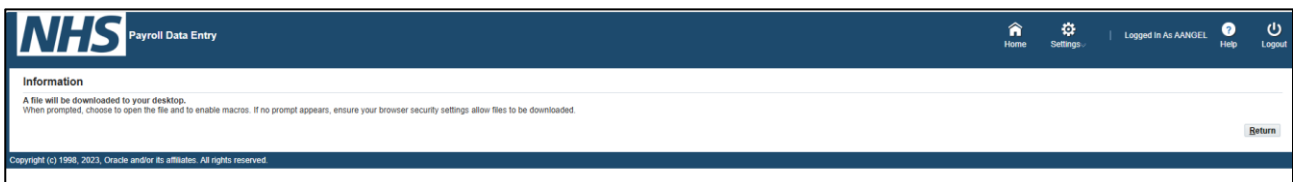
Payroll administrators can now use Web ADI to create or update personal payment methods for multiple employee assignments at the same time.

The new function is called 'Mass Update to Personal Payment Methods' and is available to the Fastpath menu for the following responsibilities:

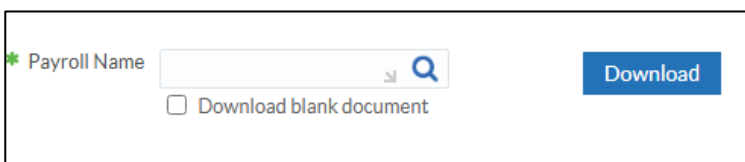
- XXX Payroll Super Administration
- XXX Payroll Administration
- XXX Payroll Data Entry



Upon clicking on the function, users will be presented with the above page, where they will be required to enter a Payroll Name. Clicking on the 'Download' button will enable the spreadsheet to be produced in an Excel format within the downloads folder. Dependent on the size of the payroll this can take a few minutes to complete.



\* The above page is displayed after clicking on the 'Download' button.



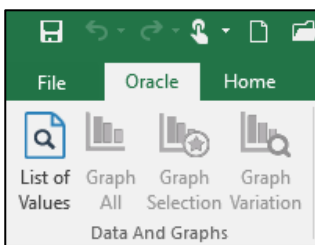
There is a checkbox called 'Download blank document'. Clicking on Download with 'Download blank document' unchecked will download payment method data for all the assignments of that payroll.

Clicking on Download with 'Download blank document' checked will download a blank document for users to create payment methods for the assignments of that payroll.

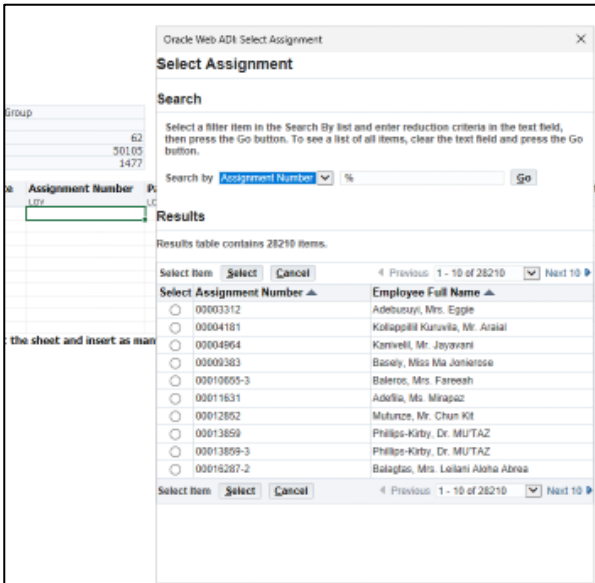
The spreadsheet contains the following columns that can be updated by the user as follows:

- **Upl** – ‘Flagged’ means the row will be included in the upload, blank means it will not be included unless all rows are selected.
- **Personal Payment Method ID** – Read Only
- **Effective Date**
- **Assignment Number** – LoV\*
- **Payment Method** – LoV\*
- **Percentage**
- **Priority**
- **Run Type** – LoV\*
- **Balance Amount**
- **Sort Code**
- **Bank Name**
- **Bank Branch**
- **Account Number**
- **Account Name**
- **Account Type**
- **BS A/C No**
- **Bank Branch Location**
- **Payee Type** – LoV\*
- **Payee Person** – LoV\*
- **Payee Organization** – LoV\*
- **Comments**
- **Pay Method Info Category**
- **Pay Method Info Segments**
- **Result** – Success or Failed
- **Messages** – Displays a message where the row has failed to upload

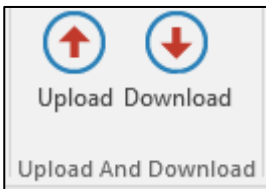
\* Where a column has LoV displayed users are able to click on the ‘List of Values’ button displayed in ribbon on the ‘Oracle’ tab.



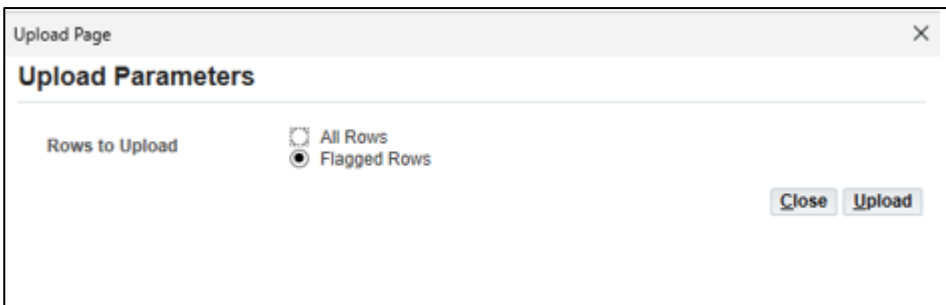
This will display the list of values available for users to select from, example shown below.



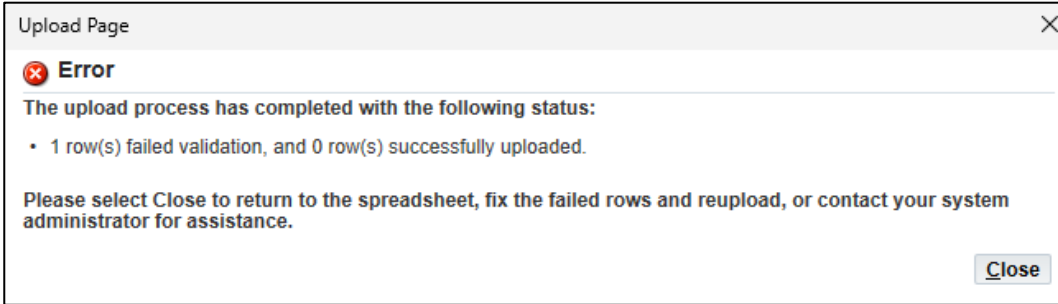
Once all the required details have been entered the user can press the 'Upload' button to upload the spreadsheet.



The user has the option to select whether they want to upload all rows or just the ones that have been flagged.



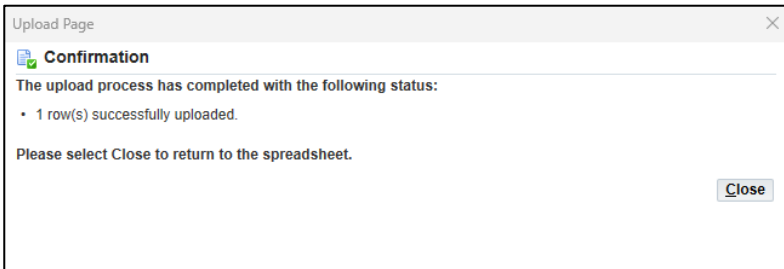
If any of the details entered into a row are invalid, then when attempting to upload the file the following message will be displayed:



It is worth noting that not all fields need to be entered, for example 'Run Type' can be entered via the spreadsheets LoV but even if you do enter a valid Run Type, it will fail as this is an auto populated field in the professional forms and so this is expected to be left blank.

The 'Messages' column will provide details as to what the issue is that needs to be corrected. However, the field only displays one issue at a time. Should the row that you have corrected have further invalid entries then the upload for this row will once again fail and a new message will be displayed.

If all the details entered into a row are valid, then upon pressing the 'Upload' button the following message will be displayed:



The updates will then be available to view in the professional forms.

Navigation Path: XXX Payroll Administration/XXX Payroll Super Administration

Fastpath > Pay Method

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## 13 Consultants Pay Progression – England Only

For English Consultants there is now a requirement for a Pay Progression process, similar to the processes used for AfC staff and for SAS Doctors. The changes described below have been introduced to facilitate this.

### Appraisal and Development Summary EIT

A new Appraisal Review Type has been added called 'Consultant Pay Prog Review'. This Review Type will be applicable to the Consultant pay scales as outlined below:

- NHS|YC51 to NHS|YC73
- NHS|YK51 to NHS|YK73
- NHS|YL51 to NHS|YL73
- NHS|YM51 to NHS|YM73

Where the Review Type is 'Consultant Pay Prog Review' then the only entries allowed in the Pay Progression field are 'Yes' or 'No', i.e. the value 'Yes following initial deferral' is not available.

Where Review Type is 'Consultant Pay Prog Review' then a different set of values is available when entering Non Progression Reasons compared to those available for other Review Types. For a Consultant review the possible Non Progression reasons are:

- Formal capability process is in place
- Formal live disciplinary action on record
- Not participated satisfactorily in the yearly job planning process
- Not participated satisfactorily in the yearly medical appraisal process
- Not undertaken any offer of APAs prior to undertaking private work
- Not met the standards of conduct governing private work
- Statutory and/or mandatory training – lack of satisfactory participation

**NOTE:** Some of the above are also available for other Review Types.

Also, because the validation of the No Progression Reason fields now requires that the Appraisal Date has been specified these fields cannot be accessed unless the Appraisal Date has been entered.

### Payroll Increment Process

Consultants will be included in the Payroll Increment Process following the same rules as are applied for AfC staff and SAS doctors with two differences:

- For Consultants all appraisal EIT rows other than those with Review Type equal to 'Consultant Pay Prog Review' will be ignored.
- There is no concept of 'Yes following deferral'.

### Pre-Increment Processing Report

The report now includes Consultants on the same basis as they are included in the Payroll Increment Process.

There is one difference however – Consultants on the 2a step will always progress to the 2b step regardless of whether an appraisal has been recorded or not for the assignment. In this scenario the report will produce the message:

'Pay Progression Meeting not required for this increment'

### New Appraisal Type

The 'Consultant Pay Prog Review' appraisal type has its own Appraisal Template and its own Questionnaire. This review type can be selected from the Standard Appraisal page as per the other appraisal types and it should be used in conjunction with its associated template.

## Create Standard Appraisal: Setup Details

Step 1 of 2

Employee Name **MK Con C, Mark**  
Employee Number **20066692**

### Setup Details

**TIP** You cannot change the appraisal template or the assignment after clicking Next.

\* Indicates required field

- \* Review Type
- \* Period Start Date (25-May-2024)
- \* Period End Date
- \* Template
- \* Meeting Date
- Next Meeting Date
- \* Assignment Number
- \* Main Reviewer

The new appraisal type has been restricted down to a set of relevant fields and a questionnaire.

**My Team Career Information** | Search | Home | Favorites | Settings | Logged In As **MKELLY** | Help | Logout | Portal

Consultant Pay Progression Review | Participants

### Create Standard Appraisal: Overview

Step 2 of 2

Employee Name: **MK Con C, Mark** | Organisation: **MK Ward A**  
 Employee Number: **20066692** | Job: **Medical and Dental|Consultant**  
 Supervisor: **MK Mgr A, Mark**

Managers should record a Pay Progression Meeting outcome for all employees on Consultant pay grades. These employees will no longer be automatically awarded a Pay Step increase where the Pay Step date would result in an increase in pay. For pay progression to occur then a positive outcome must first have been recorded for a Consultant Pay Progression Meeting within the last 365 days of their Pay Step Date. As per the terms of the Consultants pay agreement, those staff on the 2a Threshold will automatically increment to the 2b Threshold, even without a positive appraisal outcome having been recorded in the last 365 days.

**Questionnaire**

Click Complete Questionnaire to respond to the questionnaire listed below. Last Answered tells you when you last answered the questionnaire.

Questionnaire Name	Last Answered On
<b>Consultant Pay Progression</b>	

Overall Rating:  **1**

Reason 1:

Reason 2:

Reason 3:

Reason 4:

Reason 5:

**TIP** A participant is someone other than the main appraiser or appraisee who contributes to the appraisal.

The fields for this review type are as follows:

Overall Rating

Overall Rating:  **1**

Reason 1:

Reason 2:  (Dropdown: 1-Yes, 2-No)

Reason 3:

This field has allowable values of '1-Yes' and '2-No' only.

Reasons

There are up to 5 Non Progression Reason fields that can be entered.

The nationally supplied reasons are as shown below.

This list is also locally extensible via the lookup NHS\_AFC\_PAY\_NON\_PROG.

There is validation on this field to make sure that Reason 1 is mandatory where the Overall Rating is 'No', the other 4 reasons remain optional i.e. where the Overall Rating is 'No' then at least Reason 1 must be entered.

The screenshot shows a form titled "Consultant Pay Progression Review". It contains the following elements:

- Overall Rating:** A dropdown menu currently set to "2-No" with an information icon to its right.
- Reason 1:** A dropdown menu.
- Reason 2:** A dropdown menu.
- Reason 3:** A dropdown menu.
- Reason 4:** A dropdown menu.
- Reason 5:** A dropdown menu.

A list of reasons is displayed below the dropdowns:

- Formal capability process is in place
- Formal live disciplinary action on record
- Not met the standards of conduct governing private work
- Not participated satisfactorily in the yearly job planning process
- Not participated satisfactorily in the yearly medical appraisal process
- Not undertaken any offer of APAs prior to undertaking private work
- Statutory and/or mandatory training - lack of satisfactory participation

At the bottom left of the form, the text "Participants" is visible.

There is also a Questionnaire specific to this Review Type.

The screenshot shows a questionnaire titled "NATIONAL HEALTH SERVICE" with the subtitle "Summary of Consultant Pay Progression Review Meeting". The form is divided into three sections:

- Consultant Summary:** A large empty text box for the consultant's summary.
- Manager Summary:** A large empty text box for the manager's summary.
- Action Plan and Timescales:** A section with the instruction "Manager and Consultant to agree an action plan and timescales if the employee does not meet the required standards." followed by a large empty text box for the action plan.

This can be completed by the user and/or by their Appraiser, if it is shared to them.

This Questionnaire is also available for download and completion offline by the user or by their appraiser.

**New Notifications**

A set of notifications have been delivered to inform users where assignments caught by the Consultant Pay Progression rules are approaching their Increment Dates.



There will be 3 notifications, one for the affected employee, one for their manager and one for a new role called 'Consultant Pay Progression'.

### Notification for Employees

To be sent 183 days (6 months), 122 days (4 months) and 31 days (1 month) before their Increment date. A scheduled concurrent program will run overnight every night, to initiate the employee notification workflow.

This will identify employee assignments who:

- Are caught by the consultant rules.
- Have their increment date at (run date + 31 days) or (run date + 122 days) or (run date + 183 days).
- The proposed increment for the assignment would be Pay Affecting

If for any reason the process does not run one night, the next run will pick up any missed assignments since the last successful run.

The employee notification will contain the following details:

Title:

*Notification of an upcoming pay step progression point – Consultant Pay Affecting*

Body:

*This notification is to remind you of an upcoming pay step progression point. Please ensure all appropriate activity in relation to the local policies and procedures on pay progression have been completed.*

*Pay Step Date                      DD-Mon-YYYY                      (assignment increment date)*

Then show a table of all EITs rows for the Appraisal and Development Summary EIT where the Appraisal Date on the EIT is within the previous year, ending on the Assignment Increment Date.

- Review Type
- Period Start
- Period End Date
- Appraisal Date
- Next Appraisal Date
- Reviewer
- Pay Progression
- Non Progression Reason 1
- Non Progression Reason 2
- Non Progression Reason 3
- Non Progression Reason 4
- Non Progression Reason 5

This notification will also be emailed to employees, where an appropriate email address is held for them.

## Notifications for Managers

Scheduled concurrent programs will run each month to initiate the manager notifications.

Each month the manager will receive 3 notifications to identify employee assignments who:

- Are caught by the consultant rules.
- Have their increment date within the next 31 days, 90 days and 183 days.
- The proposed increment would be Pay Affecting

Managers with at least 1 employee assignment identified in the notifications above will receive the notification listing all the affected assignments reporting to them that have a proposed increment within that timeframe.

The manager notification will contain the following details:

Title:

*Notification of employees with a pay step progression point – Consultant Pay Affecting*

Body:

*The following employees have a Pay Step progression point within the next <days> days. Please ensure all appropriate activity in relation to the local policies and procedures on pay progression have been completed.*

Then show a table of all affected employee assignments for the manager. This will be sorted by alphabetically by Employee Name.

- Name (last name, first name, title)
- Assignment Number
- Email Address
- Position Name (position segment 2)
- Increment Date
- Progression Point (monetary value of point they would move to)
- Meeting Date (appraisal date on EIT)
- Meeting Outcome (pay progression on EIT)
- Next Meeting Date (next appraisal date on EIT)

Only Appraisal and Development review EIT rows of Review type 'Consultant Pay Prog Review' and with an appraisal date in the previous year from the assignment increment date will be considered.

If multiple rows exist, then the one with the latest value of appraisal date will be used for the assignment.

If no matching EIT rows exists (in the previous year from the increment date) then these values will be blank in the notification.

These notifications will also be emailed to the managers, where an appropriate email address is held for them.

## Notifications for Role Holder

Scheduled concurrent programs will run each month to initiate the Role Holder notifications.

Each month the Role Holders will receive 3 notifications to identify employee assignments who:

- Are caught by the consultant rules.
- Have their increment date within the next 45 days, 90 days and 183 days
- The proposed increment would be Pay Affecting

Role holders in each role with at least 1 employee assignment identified in the notifications above will receive the notification listing all the affected assignments for their role that have a proposed increment within that timeframe.

Where there are multiple role holders for the same role, then the first to read a notification will close it for all role holders.

Where there are no role holders for a given role, then no notification will be sent to this role.

The role notifications will contain the following details:

Title:

*Notification of employees with a pay step progression point – Consultant Pay Affecting*

Body:

*The following employees have a Pay Step progression point within the next <days> days. Please ensure all appropriate activity in relation to the local policies and procedures on pay progression have been completed.*

Then show a table of all affected employee assignments for the role. This will be sorted by alphabetically by Employee Name.

- Name (last name, first name, title)
- Assignment Number
- Email Address
- Position Name (position segment 2)
- Increment Date
- Progression Point (monetary value of point they would move to)
- Meeting Date (appraisal date on EIT)
- Meeting Outcome (pay progression on EIT)
- Next Meeting Date (next appraisal date on EIT)

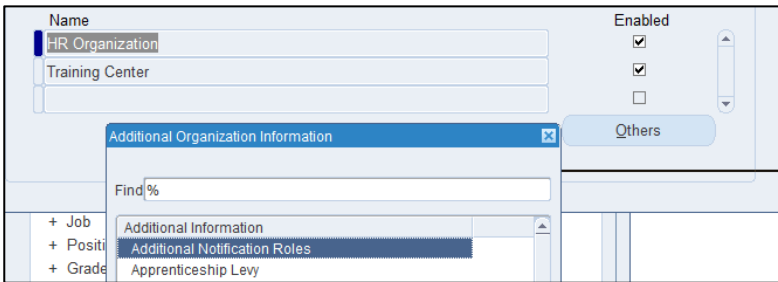
The logic for which Appraisal EIT row to display for each assignment will be the same as for the manager notification.

This notification will also be emailed to the role holders, where an appropriate email address is held for them.

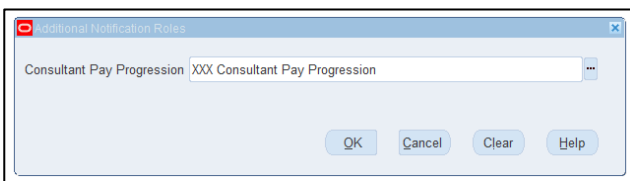
There will be a national role to receive this notification called 'Consultant Pay Progression'. Locally trusts may split this functionality and have a mix of the national role and one or more local roles. Any local role that matches the format '%Con%Pay Prog%' may be entered against the Organisation DFF to override the role to which notifications will go to for that organisation and all organisations beneath it in the organisation hierarchy (similar functionality to the Payroll Approval role).

A new Organisation EIT has been defined for this purpose.

Query up the Organisation > Highlight row for HR Organisation > Click Others > Additional Notification Roles



Enter local role:



Where an assignment is to be added into the role notification, the process will check for an override role defined for the organisation that the assignment is in. If none is found, then the process will proceed up the organisation hierarchy, looking for override values at each level. The first one it finds populated will be used for the assignment. Otherwise, if no overrides are found the default national role will be used.

**Update to the Deferral of Pay Progression Notifications**

The existing Deferral of Pay Progression notifications have been updated so that they are now triggered by a 'No' being recorded in the 'Consultant Pay Prog Review' appraisal type in addition to the existing appraisal types that trigger this notification.

The exception to this rule will be consultants on the 2a threshold that are due to progress to the 2b threshold. As this pay affecting progression will always occur, regardless of the appraisal types in place, then this will NOT be reported on in this notification.

### Deferral of Pay Progression

[OK](#) [Reassign](#) [Request Information](#)

From SYSADMIN  
To MK Emp A, Mark  
Sent 03-Jun-2024 11:10:56  
ID 195584

The pay progression will automatically be deferred based on the outcome of the appraisal process at the next increment date for the following Employees:

Name	Assignment Number	Appraisal Type	Appraisal Date	Increment Date	Deferral Date	Supervisor	Supervisor Email	Main Reviewer	Main Reviewer Email	Comments
MK Con A, Mr. Mark	20066690	Consultant Pay Prog Review	16-MAY-2024	10-JUN-2024		MK Mgr A, Mr. Mark	mkmgr@email.com			
MK Con C, Mr. Mark	20066692	Consultant Pay Prog Review	25-MAY-2024	10-MAY-2025		MK Mgr A, Mr. Mark	mkmgr@email.com			

[Return to Worklist](#)

Display next notification after my response

[OK](#) [Reassign](#) [Request Information](#)

### **Reporting**

The new Appraisal Review Type and associated fields including Questionnaire will be available for reporting in ESRBI alongside all existing Appraisal reporting.

## **14 Process to Update Failed Employee Claims**

In some scenarios the Employee Claims workflow can fail before the claim has been approved or rejected. This can leave the rows for the employee still showing as 'Pending Approval' in the Employee Claims page, when in fact the process has failed, and these rows cannot be progressed.

A new housekeeping process will now run overnight, every night, and find any failed processes and update the status from 'Pending Approval' To 'Failed'.

The affected users will then be aware that these claims have failed and are no longer with the manager for approval and should be resent, as required.

## 15 Wales Dental Foundation Trainee Annual Leave

The Annual Leave Accrual x NHS GRR have been updated with an effective date of 1<sup>st</sup> April 2023 for Welsh Dental Foundation Trainees.

Should users wish, they can run the PTO Carry Over process in order to update any previous years that have not been locally dealt with.

It should be noted too that any reports already run for these previous years such as the Cost of Outstanding Leave report and the TRS extract may also be invalid post the update.

Effective Start Date	Element Name	Scheme	Primary Pay Scale	Grade	Work Pattern	Days Year 0-10 Rate
01-Apr-23	Annual Leave Accrual 1 NHS	CYM	L	LE05	1 day a week	7
01-Apr-23	Annual Leave Accrual 1 NHS	CYM	L	LE05	2 days a week	14.5
01-Apr-23	Annual Leave Accrual 1 NHS	CYM	L	LE05	3 days a week	21.5
01-Apr-23	Annual Leave Accrual 1 NHS	CYM	L	LE05	4 days a week	29
01-Apr-23	Annual Leave Accrual 1 NHS	CYM	L	LE05	5 days a week	36
01-Apr-23	Annual Leave Accrual 2 NHS	CYM	L	LE05	1 day a week	7
01-Apr-23	Annual Leave Accrual 2 NHS	CYM	L	LE05	2 days a week	14.5
01-Apr-23	Annual Leave Accrual 2 NHS	CYM	L	LE05	3 days a week	21.5
01-Apr-23	Annual Leave Accrual 2 NHS	CYM	L	LE05	4 days a week	29
01-Apr-23	Annual Leave Accrual 2 NHS	CYM	L	LE05	5 days a week	36
01-Apr-23	Annual Leave Accrual 3 NHS	CYM	L	LE05	1 day a week	7
01-Apr-23	Annual Leave Accrual 3 NHS	CYM	L	LE05	2 days a week	14.5
01-Apr-23	Annual Leave Accrual 3 NHS	CYM	L	LE05	3 days a week	21.5
01-Apr-23	Annual Leave Accrual 3 NHS	CYM	L	LE05	4 days a week	29
01-Apr-23	Annual Leave Accrual 3 NHS	CYM	L	LE05	5 days a week	36
01-Apr-23	Annual Leave Accrual 4 NHS	CYM	L	LE05	1 day a week	7
01-Apr-23	Annual Leave Accrual 4 NHS	CYM	L	LE05	2 days a week	14.5
01-Apr-23	Annual Leave Accrual 4 NHS	CYM	L	LE05	3 days a week	21.5
01-Apr-23	Annual Leave Accrual 4 NHS	CYM	L	LE05	4 days a week	29
01-Apr-23	Annual Leave Accrual 4 NHS	CYM	L	LE05	5 days a week	36
01-Apr-23	Annual Leave Accrual 5 NHS	CYM	L	LE05	1 day a week	7
01-Apr-23	Annual Leave Accrual 5 NHS	CYM	L	LE05	2 days a week	14.5
01-Apr-23	Annual Leave Accrual 5 NHS	CYM	L	LE05	3 days a week	21.5
01-Apr-23	Annual Leave Accrual 5 NHS	CYM	L	LE05	4 days a week	29
01-Apr-23	Annual Leave Accrual 5 NHS	CYM	L	LE05	5 days a week	36

## 16 Socio-economic Background Data

A new set of questions have been introduced to enable the recording of Socio-economic background data at person level.

The ability to record and therefore report on the Socio-economic background of the NHS Workforce will support government policy. NHS England will be providing additional guidance and information to organisations on the collection of this data.

The questions and associated answers are as follows:

### **Question 1:** Occupation of your main household earner when you were aged about 14

List of Values & Associated Descriptions:

Value	Description
Modern professional or Traditional professional	Such as Teacher, Nurse, Physiotherapist, Social Worker, Musician, Police Officer (Sergeant or above), Software Designer, Accountant, Solicitor, Medical Practitioner, Scientist, Civil or Mechanical Engineer.
Senior, Middle or Junior Managers or Administrators	Such as Finance Manager, Chief Executive, Large Business owner, Office Manager, Retail Manager, Bank Manager, Restaurant Manager, Warehouse Manager.
Clerical and Intermediate Occupations	Such as Secretary, Personal Assistant, Call Centre Agent, Clerical Worker, Nursery Nurse.
Technical and Craft Occupations	Such as Motor Mechanic, Plumber, Printer, Electrician, Gardener, Train Driver.
Routine, Semi-Routine manual and Service Occupations	Such as Postal Worker, Machine Operative, Security Guard, Caretaker, Farm Worker, Catering Assistant, Sales Assistant, HGV Driver, Cleaner, Porter, Packer, Labourer, Waiter or Waitress, Bar Staff.
Long-Term unemployed	Claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year
Small Business Owners who Employed less than 25 people	Such as Corner Shop owners, Small Plumbing Companies, Retail Shop owner, single Restaurant or Cafe owner, Taxi owner, Garage owner.
Other	Such as Retired, this question does not apply to me, I don't know.
I prefer not to say	Prefer not to provide a specific response to this question.



**Question 2:** Type of school you attended for the most time between the ages of 11 and 16

List of Values:

Value
A state-run or state-funded school
Independent or fee-paying school
Independent or fee-paying school where 90% or more of tuition covered by bursary
Attended school outside the UK
I do not know
I prefer not to say

**Question 3:** Eligible for free school meals at any time (If you finished school after 1980)

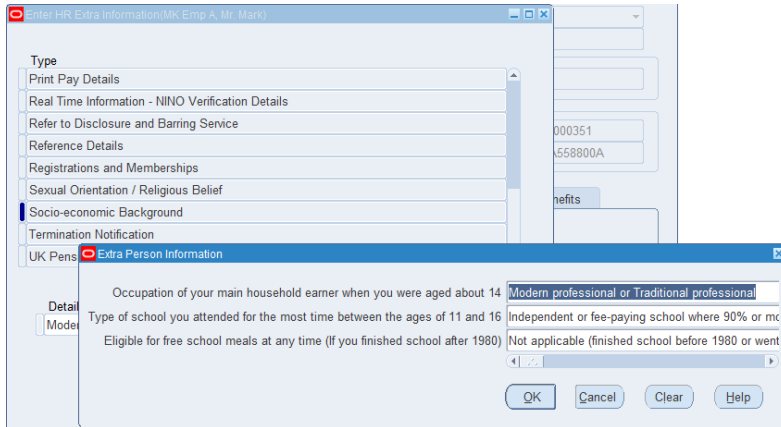
List of Values:

Value
Yes
No
Not applicable (finished school before 1980 or went to school overseas)
I do not know
I Prefer not to say

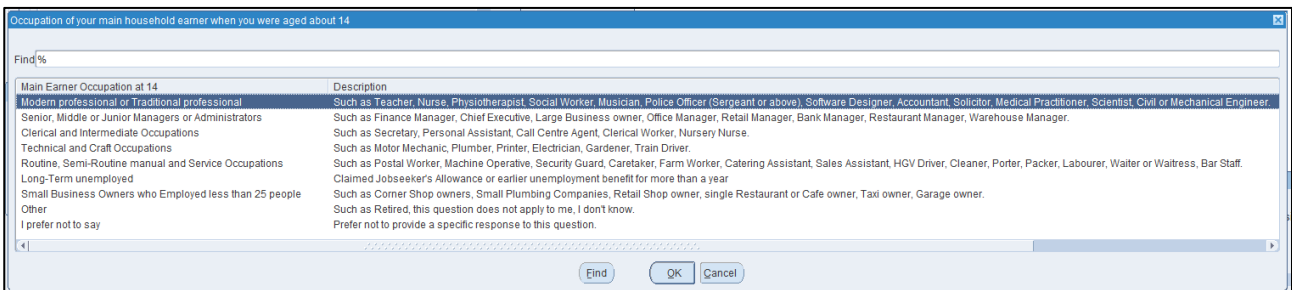
The Person EIT will be named 'Socio-economic Background' and will be made available to the following professional responsibilities, plus all variants of these:

- XXX HR Data Entry
- XXX HR Management
- XXX HR Administration
- XXX Recruitment & Applicant Enrolment Data Entry
- XXX Recruitment & Applicant Enrolment Administration
- XXX Recruitment Data Entry

This is available via the People > Enter and Maintain form under Extra Information. It has also been added to the Fastpath menus for these responsibilities.



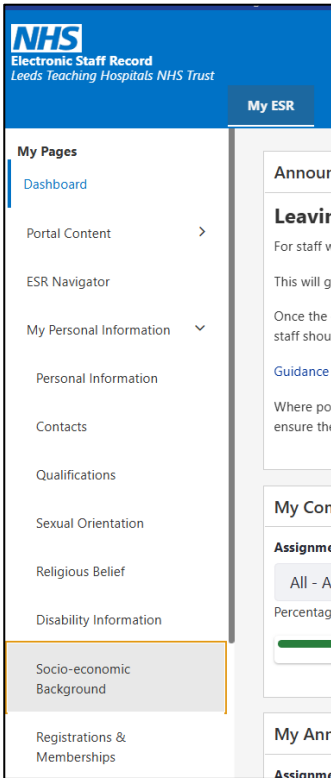
**NOTE:** Due to the length of the questions and some of the answers then it may be necessary to scroll right to see the full question and answer. It is also possible to stretch the window out to the right to see more information.



This EIT will also be made available in Employee Self Service and Employee Self Service (Limited Access) to allow employees to self-record this information against their own employment record.

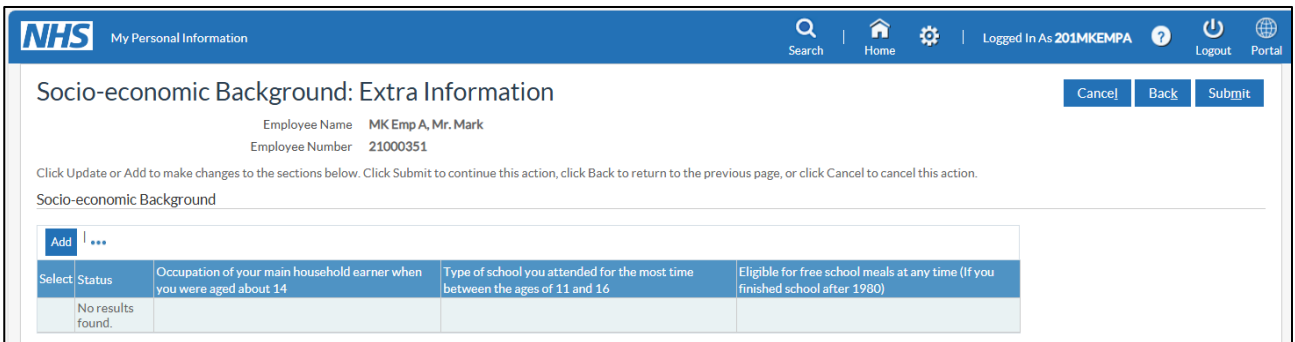
**NOTE:** As per Equality and Diversity Data, this information will not be visible to managers or supervisors through Self Service.

This functionality has been added into the My ESR Portal Menu under My Personal Information.



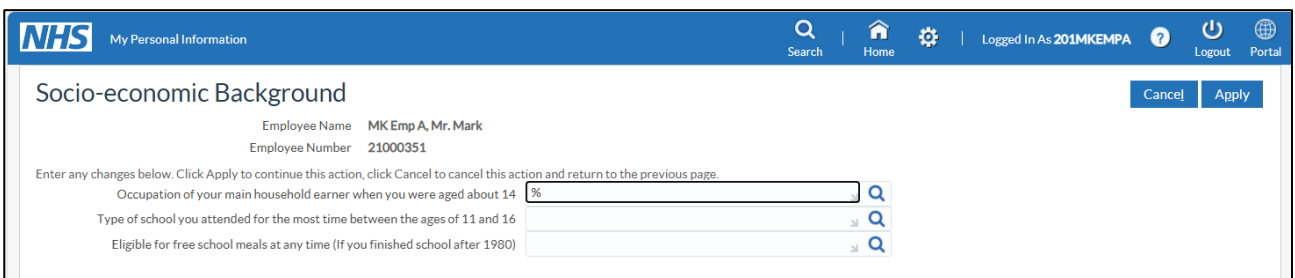
This will be present in portal for users with either Employee Self Service or Employee Self Service (Limited Access).

Where there is no existing data, users should select the Add button



They are prompted with the 3 questions and can select answers as appropriate.

The user can enter % to get the full list of options displayed for each question:



Search and Select: Occupation of your main household earner when you were aged about 14 Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Occupation of your main household earner when you were aged about 14 % Go

Results

Select	Quick Select	Occupation of your main household earner when you were aged about 14	Description
<input type="radio"/>		Modern professional or Traditional professional	Such as Teacher, Nurse, Physiotherapist, Social Worker, Musician, Police Officer (Sergeant or above), Software Designer, Accountant, Solicitor, Medical Practitioner, Scientist, Civil or Mechanical Engineer.
<input type="radio"/>		Senior, Middle or Junior Managers or Administrators	Such as Finance Manager, Chief Executive, Large Business owner, Office Manager, Retail Manager, Bank Manager, Restaurant Manager, Warehouse Manager.
<input type="radio"/>		Clerical and Intermediate Occupations	Such as Secretary, Personal Assistant, Call Centre Agent, Clerical Worker, Nursery Nurse.
<input type="radio"/>		Technical and Craft Occupations	Such as Motor Mechanic, Plumber, Printer, Electrician, Gardener, Train Driver.
<input type="radio"/>		Routine, Semi-Routine manual and Service Occupations	Such as Postal Worker, Machine Operative, Security Guard, Caretaker, Farm Worker, Catering Assistant, Sales Assistant, HGV Driver, Cleaner, Porter, Packer, Labourer, Waiter or Waitress, Bar Staff.
<input type="radio"/>		Long-Term unemployed	Claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year
<input type="radio"/>		Small Business Owners who Employed less than 25 people	Such as Corner Shop owners, Small Plumbing Companies, Retail Shop owner, single Restaurant or Cafe owner, Taxi owner, Garage owner.
<input type="radio"/>		Other	Such as Retired, this question does not apply to me, I don't know.
<input type="radio"/>		I prefer not to say	Prefer not to provide a specific response to this question.

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**NOTE:** For the first question, descriptions have been provided to assist employees in selecting the most accurate value.

Question 2 available answers:

Search and Select: Type of school you attended for the most time between the ages of 11 and 16 Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Type of school you attended for the most time between the ages of 11 and 16 % Go

Results

Select	Quick Select	Type of school you attended for the most time between the ages of 11 and 16
<input type="radio"/>		A state-run or state-funded school
<input type="radio"/>		Independent or fee-paying school
<input type="radio"/>		Independent or fee-paying school where 90% or more of tuition covered by bursary
<input type="radio"/>		Attended school outside the UK
<input type="radio"/>		I do not know
<input type="radio"/>		I prefer not to say

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Question 3 available answers:

Search and Select: Eligible for free school meals at any time (If you finished school after 1980) Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

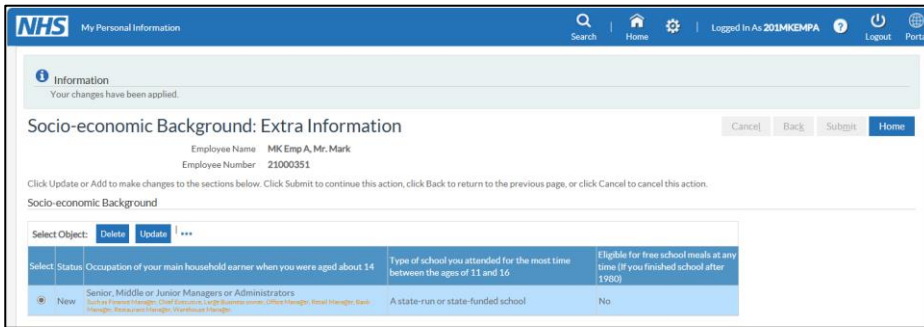
Search By: Eligible for free school meals at any time (If you finished school after 1980) % Go

Results

Select	Quick Select	Eligible for free school meals at any time (If you finished school after 1980)
<input type="radio"/>		Yes
<input type="radio"/>		No
<input type="radio"/>		Not applicable (finished school before 1980 or went to school overseas)
<input type="radio"/>		I do not know
<input type="radio"/>		I prefer not to say

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On selecting the appropriate answers, the user can then apply these changes and on submission they will be saved to their record.



### **Reporting**

The new Socio-economic fields will be available within the Employee or Applicant Personal Attributes folders within applicable Subject Areas in ESRBI. They will also be available within the Human Resources – Person EIT and Human Resources – Applicant EIT subject areas alongside existing EIT folders.

The Socio-economic Background data will also be available for national reporting through ESR Strategic Data Warehouse.

## 17 Amendments to the Apprenticeship Assignment EIT

The following changes have been made to the lookup used for the Apprenticeship Details - Assignment EIT 'Framework / Standard'.

The following 6 values have been updated:

Current Value	New Value
Junior Content Producer	Content Creator
IS Business Analyst	Business Analyst
HR consultant/Partner	People Professional
Business fire safety advisor	Fire Safety Advisor
Media production co-ordinator	Junior Production Coordinator
Commercial Procurement & Supply (Formerly Public Sector Commercial Professional)	Procurement and Supply Chain Practitioner

The following 38 new values have been added:

New Value
Health (Dental Technology)
Health and Social Care (L2&L3)
Health and Social Care (L4&L5)
Health (Clinical Health Care Support)
Health (Pharmacy Services)
Health (Dental Nursing)
Health (Health Care Support Services)
Health (Perioperative Support)
Health Care Services (Maternity & Paeds)
Digital Skills for Business
Cyber Security Analyst
Health Care Services (Therapies)
Healthcare Services (Healthcare Science)
Healthcare Services (Informatics)

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Healthcare Clinical Coding
Craft Plasterer
Data Engineer
Digital Device Repair Technician
Dispensing Optician
Embalmer
Engineering and Manufacturing Support Technician
Furniture Making Operative
Furniture Restorer
Legal technician Conveyancing Technician or Probate Technician
Licensed Conveyancer or Licensed Probate Practitioner
Maritime Electrical Fitter
Maritime Mechanical Fitter
Mechatronics Maintenance Technician
Model Maker
Pastry Chef
Publishing Professional
Recruiter
Removals Operative
Scenic Automation Technician
Scenic Construction Technician
Traffic Operator
Transport Scheduler
Domestic and Sexual Abuse Support Worker

All of the above changes will be reflected in BI Reporting and in the Data Warehouse.

## **18     New National Subjective Codes**

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

- NHS6358 - Military FY1 Trainee
- NHS6359 - Military FY2 Trainee
- NHS6361 - Military Core Trainee
- NHS6362 - Military Higher Trainee
- NHS6363 - Military Consultant