



ELECTRONIC STAFF RECORD

RN601 Guide to Enhancements and Changes Release 66.0.0.0 & 66.1.0.0

Information classification: PUBLIC

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1 <u>Introduction</u>

The purpose of this document is to provide details of the enhancements to the ESR system in Release 66.0.0.0 and 66.1.0.0. 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 <u>Liferay Portal - Collaborations on Publications</u>

Publications were introduced into the Liferay Portal as part of R65.0.0.0 and detailed in RN594 and UN3624. This restricted Local Administrator and Editor URP users (XXX Portal Site Administrator, XXX Content Editor, and XXX Content Administrator) collaborating on content.

A solution will be implemented as part of this release which will enable users to contribute to Publications created by others, based on their authentication status and assigned permissions.

For example:

- A Publication created using the XXX Content Administrator URP will be accessible to other users with the same URP, as well as those with the XXX Content Editor URP, and vice versa.
- A Publication created using the XXX Portal Site Administrator URP will be accessible to other users with the same URP.

In all cases, users will have the same permissions as the original creator, including the ability to add, edit, publish, or delete the Publication.

3 Costing Enabled for Employee Claims in SSHR

Employees are now able to add costing override values to their Employee Claims.

When entering element lines in a claim the user will now have the option of entering some costing details, similar to how costing overrides can be entered by Professional Users in the element entries form.

There is a new column on this page called Cost Allocation Information.

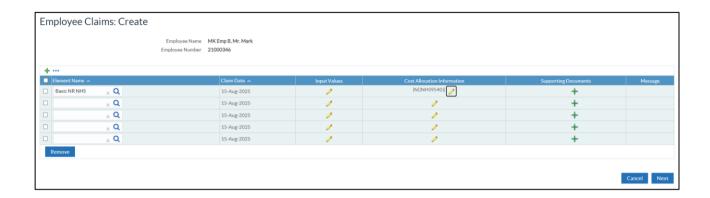


Opening this item for a claim line will allow one or more override values to be entered for costing for that element.



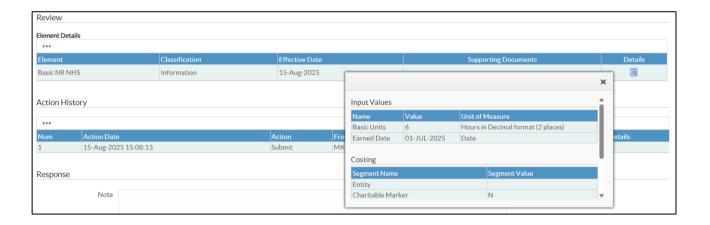


Clicking Save will add the costing overrides to the claim line.

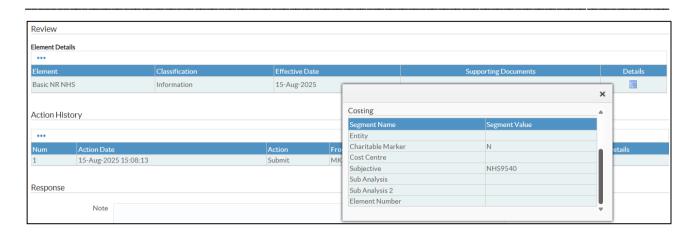


The costing proposed for an element will also be available to be reviewed by the manager as part of the review process.

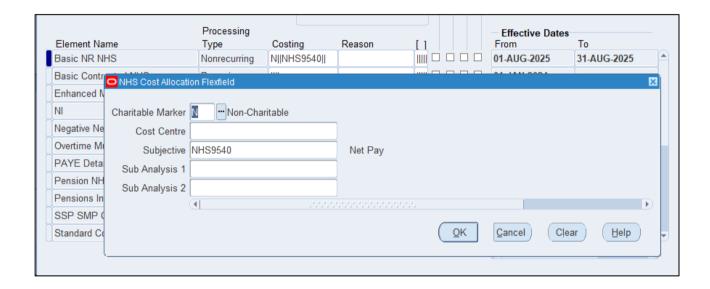
In the manager approval notification, clicking the **Details** icon for a claim row will now show both the input values entered for the element plus any costing that has been applied.



The manager may have to scroll down to see all the values entered.

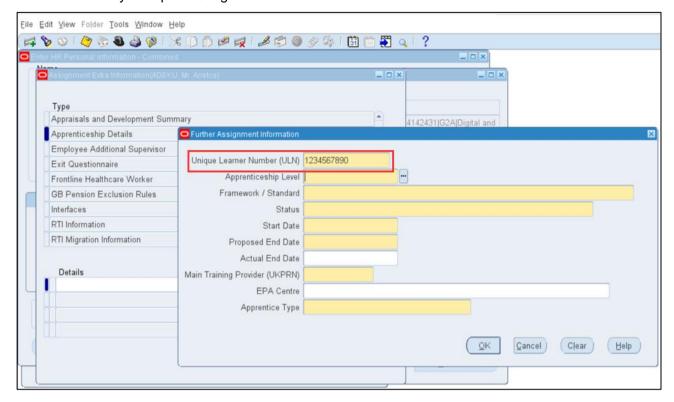


Where the claim is approved this costing information will be written to the element entry for that claim row.



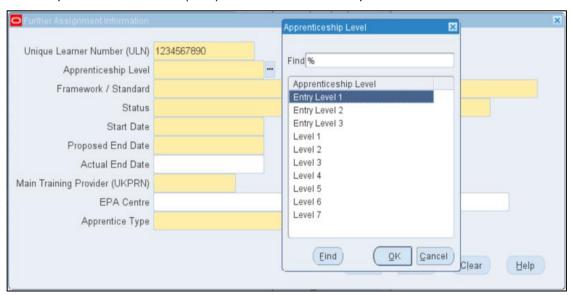
4 Update to Apprenticeship Details EIT

A new field has been added to the Apprenticeship Details EIT called Unique Learner Number (ULN). The new field will only accept a 10 digit numeric value.



XXX HR Administration > People > Enter & Maintain > Assignment > Others > Extra Information > Apprenticeship Details

The Unique Learner Number (ULN) field is available to report on in ESRBI and SDW.



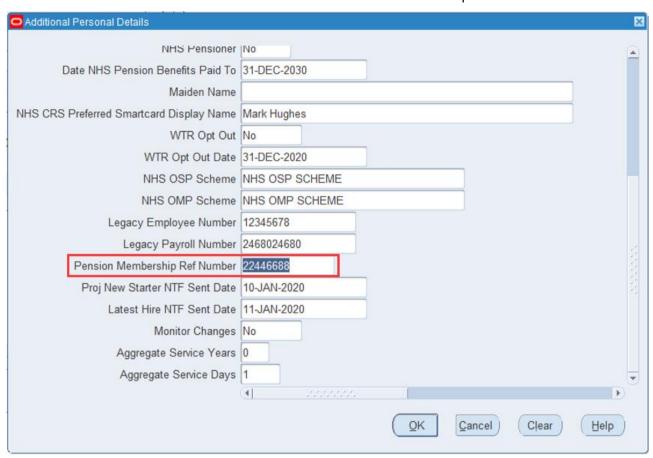
Additionally, the value Level, 'Level 8' has been removed from the Apprenticeship Level list of values.

5 Renaming of Pension SD Number

In line with NHS Pensions requirements, the SD Number has been renamed to align with the NHS Pensions naming convention of Membership Ref Number. The following changes have been made to reflect this.

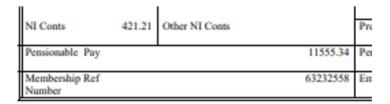
Person EIT

The Pension SD Number field has been renamed to Pension Membership Ref Number.



Copy Pay Advice Report

SD Number has been renamed to Membership Ref Number.



Online Payslip (English and CQC versions)

SD Number has been renamed to Membership Ref Number.

NI PAY	4189.00	OTHER NI PAY	8496.31	PREVI
NI CONTS	421.21	OTHER NI CONTS		PREVI
PENSIONABLE	PAY	-	11555.34	PENSI
MEMBERSHIP NUMBER	REF		63232558	EMPL(

Online Payslip (Welsh version)

RHIF CYF. SD has been renamed to RHIF CYF. AELODAETH

NILETIER				1 881
TÅL YG NI PAY	4189.00	TÅL YG ARALL OTHER NI PAY	8496.31	TÅL T PREV
CYFR. YG NI CONTS	421.21	CYFR YG ERAILL OTHER NI CONTS		TRET PREV
TÅL PENSYNIADWY PENSIONABLE PAY	,		11555.34	CYFR PENS
RHIF CYF. AELODAE MEMBERSHIP REF N			63232558	RHIF

6i Reports

The column SD Number has been renamed to Membership Ref Number in the following reports:

- NHS Annual Pension List Report
- NHS Periodic Pension List Report
- NHS Pensionable Pay Report (Text and Excel outputs)
- NHS Pensions Data Exceptions Report
- NHS Pensions Payment Exceptions Report
- NHS IAT PDS Full Details Report

BI Reporting

All occurrences of 'SD Number' or 'Pension SD Number' in the BI folders have been updated to be displayed as 'Pension Membership Ref Number'.

Total Rewards Statement (TRS) Website

The search field that was labelled 'SD Number' available to the TRS Query handler and to the TRS Super Administrator has been renamed to 'Membership Number'.

'SD Number' was also a column header in the results page of this search, this has also been renamed to 'Membership Number'.

In the end user TRS Statement pages, this item is already named 'Membership Number'.

Enhancement to the Applicant Purge Process

An enhancement to the Applicant Purge process within ESR to improve data quality and system performance will be implemented following Release 66 at the end of September 2025. Please refer to UN3662 for further details.

7 New National Subjective Codes

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

•	NHS511111010	Salary - Chief executive
•	NHS511111020	Salary - Accountable officer
•	NHS511111030	Salary - Executive director
•	NHS511111040	Salary - Director
•	NHS511111050	Salary - ESM1
•	NHS511111060	Salary - ESM2
•	NHS511111070	Salary - ESM3
•	NHS511111090	Salary - Very senior manager
•	NHS511111110	Salary - CS Administrative assistant
•	NHS511111120	Salary - CS Administrative officer
•	NHS511111130	Salary - CS Executive officer
•	NHS511111140	Salary - CS Higher executive officer
•	NHS511111150	Salary - CS Senior executive officer
•	NHS511111160	Salary - CS Grade 6
•	NHS511111170	Salary - CS Grade 7
•	NHS511112010	Salary - B1 Administrative and clerical
•	NHS511112020	Salary - B2 Administrative and clerical
•	NHS511112030	Salary - B3 Administrative and clerical
•	NHS511112040	Salary - B4 Administrative and clerical
•	NHS511112050	Salary - B5 Administrative and clerical
•	NHS511112060	Salary - B6 Administrative and clerical
•	NHS511112070	Salary - B7 Administrative and clerical
•	NHS511112081	Salary - B8a Administrative and clerical
•	NHS511112082	Salary - B8b Administrative and clerical
•	NHS511112083	Salary - B8c Administrative and clerical
•	NHS511112084	Salary - B8d Administrative and clerical
•	NHS511112090	Salary - B9 Administrative and clerical
•	NHS511112091	Salary - Trust scale NHS Infrastructure support
•	NHS511112320	Salary - B2 Maintenance
•	NHS511112660	Salary - B6 Ambulance
•	NHS511113050	Salary - B5 Qualified nurse
•	NHS511113060	Salary - B6 Qualified nurse
•	NHS511113070	Salary - B7 Qualified nurse
•	NHS511113081	Salary - B8a Qualified nurse
•	NHS511113082	Salary - B8b Qualified nurse
•	NHS511113083	Salary - B8c Qualified nurse
•	NHS511113084	Salary - B8d Qualified nurse
•	NHS511113090	Salary - B9 Qualified nurse
•	NHS511113510	Salary - B1 Unqualified nurse
•	NHS511113520	Salary - B2 Unqualified nurse
•	NHS511113530	Salary - B3 Unqualified nurse
•	NHS511113540	Salary - B4 Unqualified nurse

Customer Education

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•	NHS511113620	Salary - B2 HCA Support to Nursing
•	NHS511113630	Salary - B3 HCA Support to Nursing
•	NHS511113640	Salary - B4 HCA Support to Nursing
•	NHS511114040	Salary - B4 Clinical scientists
•	NHS511114050	Salary - B5 Clinical scientists
•	NHS511114060	Salary - B6 Clinical scientists
•	NHS511114070	Salary - B7 Clinical scientists
•	NHS511114240	Salary - B4 Other ST and T staff
•	NHS511114310	Salary - B1 Pharmacy
•	NHS511114320	Salary - B2 Pharmacy
•	NHS511114330	Salary - B3 Pharmacy
•	NHS511114340	Salary - B4 Pharmacy
•	NHS511114350	Salary - B5 Pharmacy
•	NHS511114360	Salary - B6 Pharmacy
•	NHS511114370	Salary - B7 Pharmacy
•	NHS511114381	Salary - B8a Pharmacy
•	NHS511114382	Salary - B8b Pharmacy
•	NHS511114383	Salary - B8c Pharmacy
•	NHS511114384	Salary - B8d Pharmacy
•	NHS511114390	Salary - B9 Pharmacy
•	NHS511114440	Salary - B4 Psychology
•	NHS511114450	Salary - B5 Psychology
•	NHS511114460	Salary - B6 Psychology
•	NHS511114470	Salary - B7 Psychology
•	NHS511114530	Salary - B3 Social worker
•	NHS511114540	Salary - B4 Social worker
•	NHS511114550	Salary - B5 Social worker
•	NHS511114560	Salary - B6 Social worker
•	NHS511114570	Salary - B7 Social worker
•	NHS511115050	Salary - B5 Occupational therapy
•	NHS511115060	Salary - B6 Occupational therapy
•	NHS511115070	Salary - B7 Occupational therapy
•	NHS511115081	Salary - B8a Occupational therapy
•	NHS511115330	Salary - B3 Physiotherapy
•	NHS511115340	Salary - B4 Physiotherapy
•	NHS511115350	Salary - B5 Physiotherapy
•	NHS511115360	Salary - B6 Physiotherapy
•	NHS511115370	Salary - B7 Physiotherapy
•	NHS511115381	Salary - B8a Physiotherapy
•	NHS511115382	Salary - B8b Physiotherapy
•	NHS511115383	Salary - B8c Physiotherapy
•	NHS511115384	Salary - B8d Physiotherapy
•	NHS511115390	Salary - B9 Physiotherapy
•	NHS511115450	Salary - B5 Podiatrist
•	NHS511115460	Salary - B6 Podiatrist
•	NHS511115470	Salary - B7 Podiatrist

Salary - B8a Podiatrist NHS511115481 Salary - B8c Radiology NHS511115583 NHS511115640 Salary - B4 Speech therapy Salary - B5 Speech therapy NHS511115650 Salary - B6 Speech therapy NHS511115660 Salary - B7 Speech therapy NHS511115670 NHS511115681 Salary - B8a Speech therapy NHS511115682 Salary - B8b Speech therapy Salary - B3 Dietician NHS511115830 NHS511115850 Salary - B5 Dietician NHS511115860 Salary - B6 Dietician Salary - B7 Dietician NHS511115870 NHS511116010 Salary - Consultant NHS511116050 Salary - Chief medical officer Salary - Dental consultant NHS511116060 NHS511116140 Salary - Locum clinical assistant Salary - General practitioner NHS511116160 Salary - Trust scale Medical career grade NHS511116180 NHS511116190 Salary - Clinical fellow NHS511116430 Salary - Core training 1 (CT1) Salary - Locum trainee grade NHS511116710 NHS511117050 Salary - Bank Qualified nursing and midwifery B5 Salary - Bank Qualified nursing and midwifery B6 NHS511117060 NHS511117070 Salary - Bank Qualified nursing and midwifery B7 NHS511117080 Salary - Bank Qualified nursing and midwifery B8+ Salary - Bank AHP NHS511117110 NHS511117120 Salary - Bank Other ST and T NHS511117510 Salary - Dean Salary - Deputy dean NHS511117520 NHS511117530 Salary - Associate dean Salary - GP Clinical tutors NHS511117540 Salary - Dental tutors NHS511117550 Salary - Vocational dental practitioner NHS511117560 Salary - Senior lecturer NHS511117570 NHS511117580 Salary - Dental technicians NHS6587 Bank Psychotherapists/Psychological Therapists Band 8c HEALTHY LIFESTYLE ADVISOR BAND 6 NHS6588 HEALTHY LIFESTYLE ADVISOR BAND 5 NHS6589

HEALTHY LIFESTYLE ADVISOR BAND 4

HEALTHY LIFESTYLE ADVISOR BAND 3

Customer Education

NHS6590

NHS6591

8 Additional Columns Available for Supplier and Customer Records

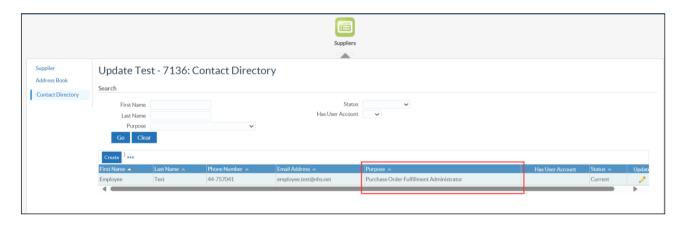
Additional columns have been added to OLM in the following areas:

- Suppliers
- Customers

Suppliers

Purpose Column

XXX Learning Administration > Manage Resources > Suppliers > Search for Supplier > Click Contact Directory



There is a new column titled Purpose between the Email Address and Has User Account columns.

Customers

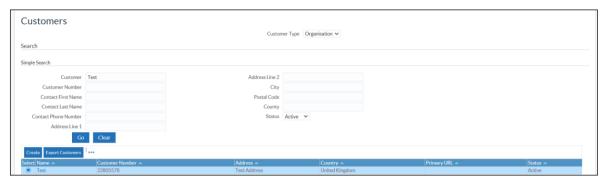
Phone Number Column

XXX Learning Administration > Manage Learners > Customers

Search for Customer > Click Go



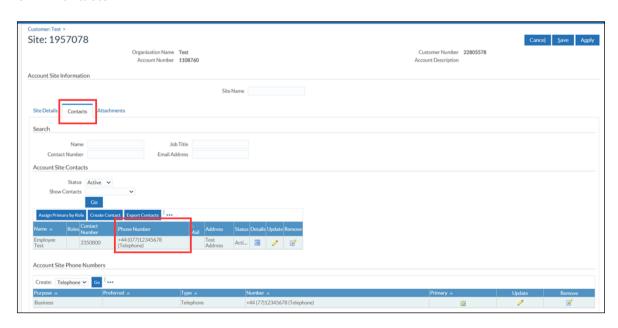
Click on Customer name:



Click **Details** on Sites table:



Click Contacts tab:



There is a new column titled Phone Number between the Contact Number and E-mail columns on the Account Site Contacts table.

9 Pension Capping Values

In accordance with NHS Pensions Regulations, the Pension Capping values for 2022/23 and 2023/24 have been updated within ESR.

The revised values are as follows:

6th April 2022 = £181,800

6th April 2023 = £205,200

Action

- Retropay will not trigger automatically so an Assignment Set will need to be created for potentially affected employees for use with Retropay by Element.
- The Employees by Element List should be run and used to identify potential employees for the Assignment Set.

10 Change to Excel Formats Supported in Load Element Lines

Load Element Lines functionality has been changed to support Excel files in .xlsx and .xlsm workbook formats.

NOTE: Excel files in .xls workbook formats are no longer supported.

11

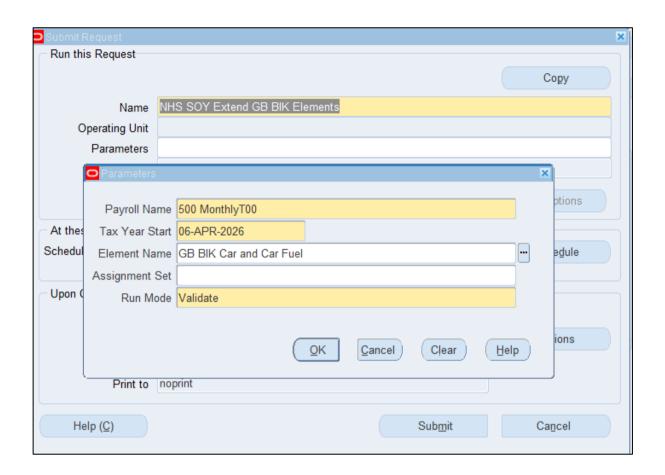
New Start of Year Process for Benefit in Kind Elements

A new concurrent program 'NHS SOY Extend GB BIK Elements' process has been introduced to assist users in managing the GB BIK Elements at the start of new tax year.

The process will help to do the following:

- End the active GB BIK element entries that are attached to assignments at the end of previous tax
 year and create new element entries in the current tax year by copying the input values from the
 corresponding element entry in the previous tax year.
- Provide the ability to run for all assignments with the GB BIK elements in a selected payroll, or for a selection of assignments via an assignment set.
- Provide the ability to run for selected GB BIK Element or for all GB BIK Elements.
- The Benefit Start Date and Benefits End Date on the element entries created in the new tax year will always set to the start date and end date of the new tax year if these values have been entered on the element in the tax previous year. If there is no Start/End date entry on the element in the previous tax year, then nothing will be copied across to the new tax year, however all other data entries will be copied across.
- Any variance to the Benefit Start/End Dates, or other input values copied from the previous year entry, would need to be managed locally outside of the process.
- The process will be available to run in two modes Validate and Commit. The Validate Mode will
 provide an output report for checking. The Commit Mode will apply the changes and will not have
 the rollback facility.
- The process will not pick-up the assignments if BIK element entry is already end dated in the previous tax year.
- If multiple open ended element entries of the same BIK element type exist for the assignment, then it will not process the assignment and will list them as errored assignments/element entries in the output file. These assignments will need to be managed manually outside of the process.
- The use of the process will be limited to the Start of Year timeframes, as such will only be made available to run in the same time period as the SOY and P9 processes, it will be unavailable for the rest of the tax year.

The new process will be available to run from XXX Payroll Super Administration URPs and will have the following Parameters:



Parameter Name	Required/ Optional	List of Values (LoV)	Default Value
Payroll	Required	LOV Of Payrolls for the trust	
Tax Year Start	Required	Start date of current tax year based on the date track date being used and payroll selected, for example 06-Apr-2026. For a monthly payroll or start date of first period in 2026-27 tax year, the date track date would need to be on or after the 6th April of the new tax year, for a weekly payroll, the date track date would need to be the start of Week 1 of the new tax year.	
Element Name	Optional	LOV of BIK recurring elements	GB BIK Car and Car Fuel
Assignment Set	Optional	LOV of assignment sets for the payroll selected	
Run Mode	Required	Validate/Commit	Validate

The process can be run either:

- For all the GB BIK Elements and for all assignments in a selected payroll when Element Name and Assignment Set parameter values are null (OR)
- For all the GB BIK Elements and for a set of assignments within the selected payroll when Element Name parameter is set to null and an Assignment Set is selected (OR)
- For a selected GB BIK Element and for all assignments in a selected payroll when Element Name parameter is selected and Assignment Set parameter value is null (OR)
- For all the GB BIK Elements and for set of assignments within the selected payroll when Element Name parameter is null and an Assignment Set is selected.

The process provides the ability to run in two modes – Validate and Commit.

Validate mode will identify the assignments/element entries based on the payroll, tax year start date, element name and assignment set values selected and report the following in an output file **without** applying the changes to the element entries:

- Summarise the count of assignments/element entries which will be successfully processed and count of assignments/element entries which will be errored when the process is run in Commit mode
- List the details of assignments/GB BIK element entries which will be errored when the process is run in Commit mode and the reason for the error.
- List the details of assignments/GB BIK element entries which will be processed successfully when the process is run in Commit mode.

Commit mode will identify the assignments/element entries based on the payroll, tax year start date, element name and assignment set values selected and will perform the following:

• End Date the identified element entries which meets the criteria as at previous tax year end date and create the new element entries in the new tax year by copying all the input values except the Benefit Start Date and End Date from the corresponding BIK element entry in the previous tax year. The Benefit Start Date and Benefit End Date will be defaulted to the start and end dates of the new tax year. If there are no entries in the Start/End date fields in the previous tax year, nothing will be copied across to the new tax year. All other data entries in the element will be copied across.

NOTE: Any variance to the input values will need to be managed manually outside the process.

- Summarise count of assignments/element entries which are successfully processed and count of assignments/element entries which are errored in the output file.
- List the details of assignments/GB BIK element entries which are errored and the reason for the
 error. If multiple open ended element entries of the same BIK element type exist for the assignment,
 then it will not process the assignment and will list them in errored assignments/element entries in
 the output file. These element entries will need to be managed manually outside of the process.
- List the details of assignments/GB BIK element entries which are successfully processed in the output file.

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Sample Output file:

```
NHS SOY Extend GB BIK Elements Process
 Parameters:
  Payroll
                      : 425 Monthly
  Tax Year Start : 06-APR-2026
  Element Name
                      : All GB BIK elements
  Assignment Set
  Run Mode
Running in Validate Mode.
The following shows what would have been processed if running in Commit Mode
Entries successfully updated
                                 : 258
Errors during updates
______
The following assignments did not have their entries deleted/created
- Asg 00073512:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
- Asg 00073512:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
- Asg 20422624-2:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
 - Asg 20422624-2:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
 - Asg 26394917:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
 - Asg 26394917:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
 - Asg 50844208-3:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
- Asg 50844208-3:GB BIK Car and Car Fuel: Error deleting entry: multiple entries of same type exist
The following assignments had their entries deleted/created
 - Asg 00016931:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00034746:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00174811:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00310662-2:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00378243:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00388290-2:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00405013:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00482187-2:GB BIK Car and Car Fuel: Entry deleted/created
 - Asg 00640446:GB BIK Car and Car Fuel: Entry deleted/created

    Asg 00808298:GB BIK Car and Car Fuel: Entry deleted/created
    Asg 00812776:GB BIK Car and Car Fuel: Entry deleted/created
    Asg 00822624:GB BIK Car and Car Fuel: Entry deleted/created
```

Customer Education

12 Change to the NCIA Element for England

The Nat Clin Imp Awd NP NHS element has now been excluded from the calculation for Additional Programmed Activities. This change is not retrospective.

13 HMRC Advisory Fuel Rates for 01 September 2025

HMRC has published new advisory fuel rates for company cars effective 01 September 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 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	*22p	*21p

Engine Size	Diesel
1600cc or less	12p
1601cc to 2000cc	*13p
Over 2000cc	18p

Engine Size	Electric (Home)
1400cc or less	8p
Over 1400cc	8p

In addition to the above rates, there is a new rate for electric cars that are charged from a public charger as opposed to charging at the employee's home. With effect from 01 September 2025, HMRC have approved a new rate for reimbursement of charging an electric car from a public charger:

Engine Size	Electric (Public)
9999cc or less	14p

For the above Electric Public Charger rate, a new table

"NHS_INLAND_REV_AUTH_MILEAGE_ELECTRIC_PUBLIC_COMPANY_RATES" has been added. Users will need to select the new table against Mileage elements for electric vehicles in cases where this is applicable.

Action

Please note that mileage payments are not processed when Retropay is run, so any changes to the amounts already paid will need to be made manually.

^{*} No change has been made to these rates. These are stated for information only.