Person Types in ESR

Introduction

NHS Organisations have a Duty of Care to provide support and opportunities for those providing a service, including employees, volunteers, those on Honorary contracts and self-employed contractors.

There is also a responsibility to maintain their health, well-being, safety and to ensure compliance with health and safety regulations.
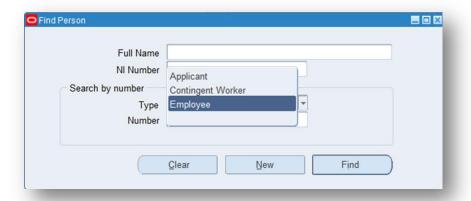
Recording Employee Person Types provides a mechanism to accurately differentiate those providing a service to your Organisation, for example volunteers and contractors, for reporting and monitoring purposes at a regional and national level.

System Person Types

ESR Records 3 System Person Types:

- Applicant

- Contingent Worker

- Employee

We will focus on Employee Person Type Usage.
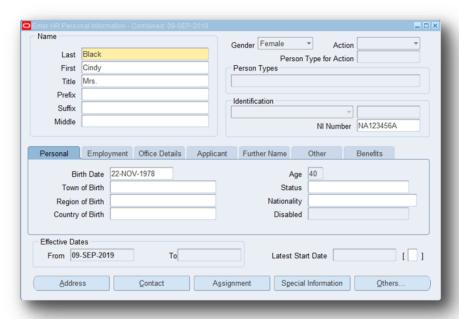
Person Types

- Contractor No PAYE – Contractors who are not being paid via the Organisations Payroll

- Contractor PAYE – Contractors who are being paid via the Organisations Payroll

- External Supervisor – Not employed by your Organisation but supervising your employees

- Honorary – Contract holders who carry out duties in an Organisation but are not paid by them. These are usually Medical Consultants

- Seconded (To Professional Training) – Employees who are seconded out of the Organisation to complete Training

- Secondee (Non Paid from External Body) – Not employed by your Organisation but carry out their duties within it

- Service Users and Carers

- Shared Appointment – Identifies employees who are Job Sharing

- Trainee – Undertaking duties as a trainee

- Volunteer – Undertaking duties as a volunteer

- Widow/Widower – To make specific payments to a beneficiary
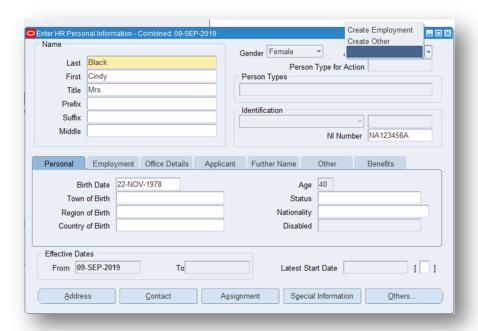
How to Record Person Types

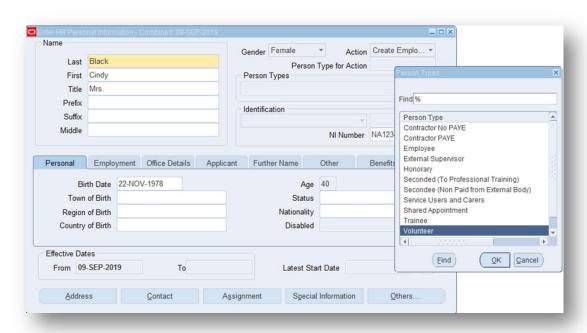If you are hiring directly using the XXX HR Admin URP, enter:

- Name
- Date of Birth
- NI Number

Click in the Action field.

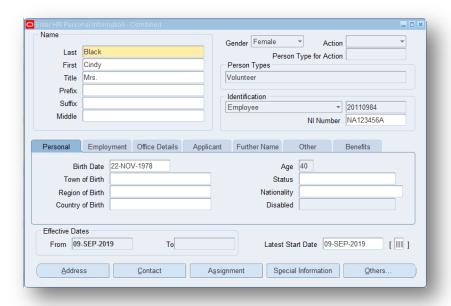Select Create Employment from the List of Values.

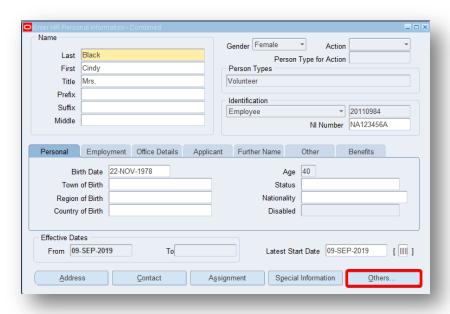You will then be presented with the Person Type List of Values.

Choose Volunteer from the List of Values.
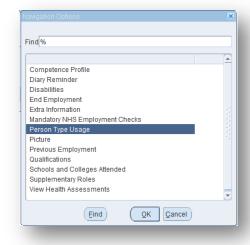
The Person Type is now recorded as Volunteer.
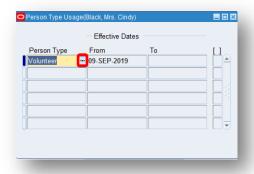

How to Change a Person Type

Click on the Others button on the Enter HR Personal Information Form.
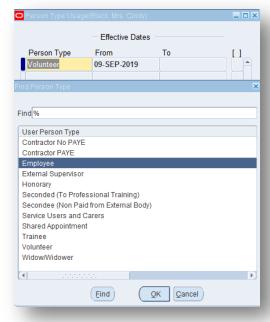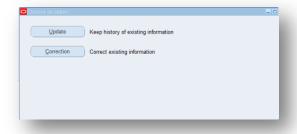
Person Types in ESR

Select Person Usage Type from the List of Values and click on the button next to the Person Type field.

Select the new Person Type from the List of Values and click OK.

Click on Update or Correction as appropriate and save the change.

Why Record Person Types on ESR

There are several advantages for recording Person Types on ESR.

You can use NHS Jobs/3rd Party e-Recruitment systems during the Recruitment Process, taking advantage of the interfaces between the Recruitment system and ESR.

You can also run an Inter Authority Transfer to identify any previous NHS employment and competencies held and transfer this information via the Portable Data Set.

You can use ESR to record the following:

- Personal Details
- Mandatory Employment Checks
- ID Checks
- Professional Registration
- DBS
- Qualifications

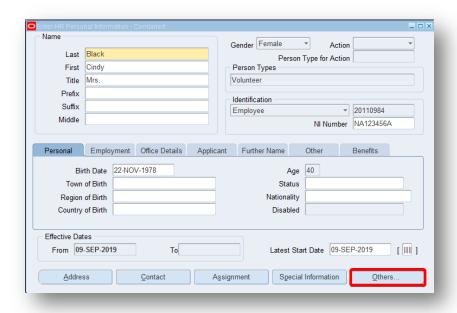And, where appropriate, access can be given to:

- Employee Self Service/Employee Self Service LA
- Access to complete e-Learning

Where access to Employee Self Service is given a Supervisor will need to be assigned to approve requests that require it.
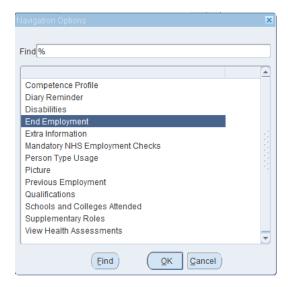
Housekeeping

Organisations should ensure that they have the appropriate processes in place to identify when the person type record is no longer required. The record should be terminated.

Click on the Others button on the Enter HR Personal Information Form.

You will then be given the option to End Employment.
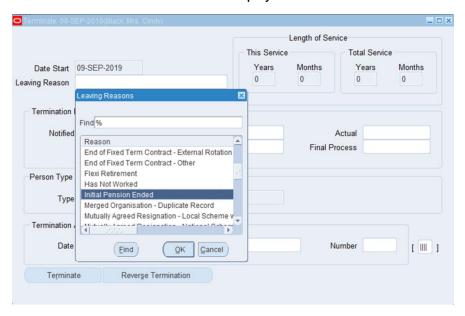
Widows and Widowers

Setting up Widows and Widowers ensure that specific payments can be made to a beneficiary.

To ensure that payments can be made you will need to set up an Organisation for Widows and Widowers (XXX Widows and Widowers) in order for them to be attached to a payroll.

Once all payments due have been made the Widow or Widower should be terminated. The reason for Reason for Termination should be Initial Pension Ended.
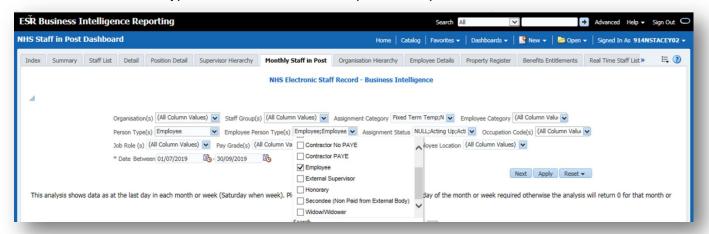
There is no need to add a future date to the final process date field as the record should not be terminated until all payments due have been made.

Business Intelligence Reporting

All standard BI reports use Employee as a default which means that, for example, terminated Contractors will not be included in the Organisations Leavers reports.

However Person Types can be included in reports if required.

Recording Apprentices

Previously apprentices were identified using the three specific Apprentice Job Roles which were available within the Additional Clinical Services, Administrative & Clerical and Estates & Ancillary staff groups.

Following the introduction of the apprenticeship Extra Information Type (EIT) form in June 2018 the apprenticeship Job Roles were retired from the National Workforce Data Set (NWD) as agreed by the Workforce Information Review Group (which is chaired by NHS Digital and has representatives from NHS Organisations and Arm's Length Bodies) and instead organisations were advised to use a Job Role more relevant to the role the apprentice is undertaking for the duration of their apprenticeship.

The EIT also records other information which is specific to the apprenticeship.

As a result it's now possible to report on the roles that apprentices are undertaking in the NHS, rather than just knowing that apprentices were employed.

E.g. An Apprentice Health Care Assistant would have previously been recorded with a Job Role of 'Additional Clinical Services | Apprentice', however this can now be recorded with a Job Role of 'Additional Clinical Services | Healthcare Assistant' and the Apprenticeship EIT should be populated with a Framework/Standard of 'Health - Clinical Healthcare Support'.

Completion of the information in the EIT enables more detailed Local and National Reporting.

The information on the EIT is available as part of the Portable Data Set.

Recording Apprentice Information

Apprentice Information can be recorded by users with the following URPs:

XXX HR Administration

XXX HR Administration (With RA)

XXX HR Data Entry XXX HR Data Entry (With RA)

XXX HR Management

XXX Payroll Administration

XXX Payroll Data Entry

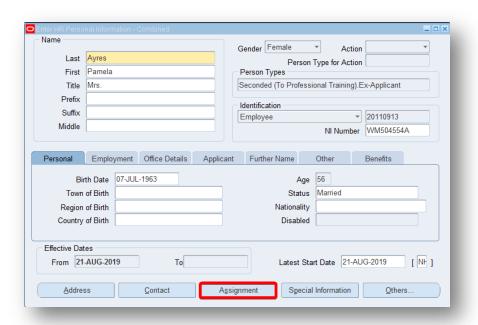XXX Payroll Super Administration

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XXX Recruitment & Applicant Enrolment Administration

XXX Recruitment & Applicant Enrolment Administration (with RA)

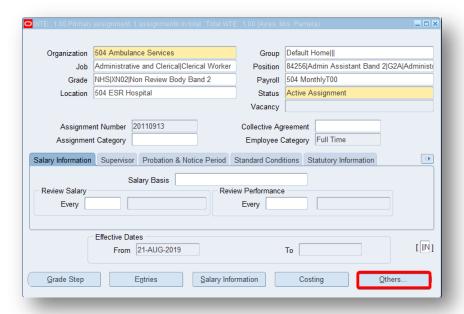XXX Recruitment & Applicant Enrolment Data Entry
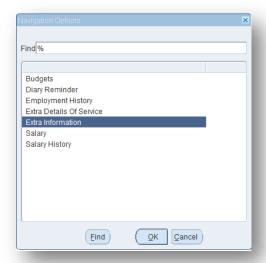
XXX Recruitment Data Entry

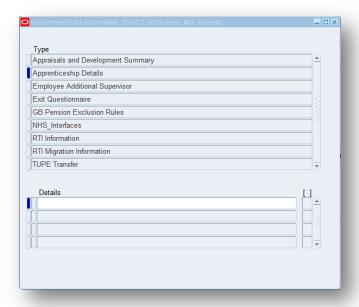XXX Learning Administration
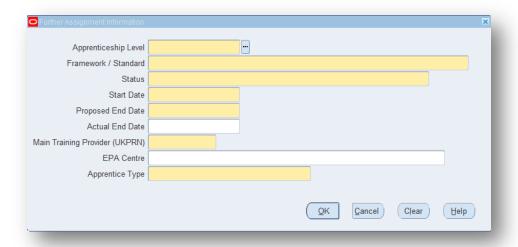

Click on the Assignment Button.

Select Extra Information from the list of values and click ok.
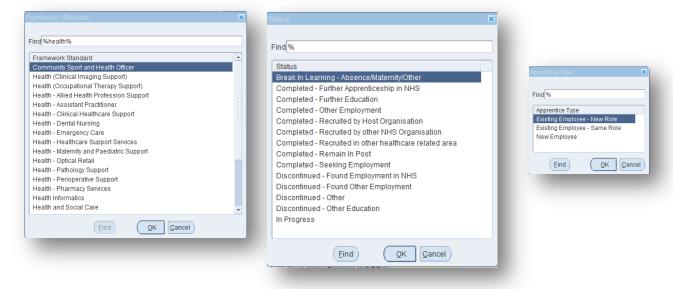
Click in the Apprenticeship Details field.

Click in the Details field to complete the Further Assignment Information form.

Person Types in ESR

October 2019

It's your **ESR**

Shown below are some of the Lists of Values in the Apprenticeship Details Further Information form:

Business Intelligence Reporting

The Apprenticeship Details tab on the NHS Staff in Post Dashboard provides a number of summary analyses designed to provide users with high level information of employees undertaking Apprenticeship at a specified report effective date or period. By default the analyses returns only employees whose EIT Apprenticeship details are populated in ESR.