

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0268 GUIDE TO INTER AUTHORITY TRANSFER

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# 1. DOCUMENT CONTROL

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## DISTRIBUTION

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### 3. INTRODUCTION

The Inter Authority Transfer (IAT) process combines multiple common tasks associated with recruitment to reduce the amount of data entry required, following the appointment of existing NHS staff from other NHS Organisations.

IAT is a bespoke ESR solution and can be used in the following scenarios:

- When an employee who works (or has worked) for one NHS Organisation successfully applies to work for another
- For employees successful in applying for a new role in their current NHS Organisation
- Employees returning to work for the NHS following a break in service
- Recruiting internal applicants

The Inter Authority Transfer process helps to deliver the following business benefits and needs:-

- Improve the range and quality of data transferred between NHS Organisations, including a complete employment service history from Organisations using ESR
- Facilitate the earlier production of Contracts of Employment as a result of more timely and accurate data transfer
- Securely transfer details of immunisations and vaccination checks at the pre-employment stage to Occupational Health Advisors (role holders)
- Transfer pre hire data related to statutory and mandatory competencies to aid induction programmes and remove duplicate training and associated costs
- Assist in paying staff correctly from commencement of employment reducing the need for retrospective corrections
- Provide details relating to Cash Floor Protection and Annual Leave Appointment elements for doctors in training to the proposed new employer
- Enables the standard NHS Employers Reference to be sent to a previous employer (internal or external) for completion and returned to the requestor Organisation electronically
- Highlights at the pre-hire stage in the standard factual reference notification an indication as to whether employee relations information exists for an employee
- Reduce processing costs at Organisation level by automating key tasks
- Reduce the time delay in obtaining current NHS staff information following transfers.

It also supports the efficient on-boarding of new starters by:

- Enabling a more robust new starters process with reduced repeated administration
- Being able to update employment records online instead of using paper forms
- Having an onboarding process that is effective and professionally managed
- Having previous training and skills records recognised and transferred
- Experiencing a relevant and value-adding induction

IAT features an automated initiation and approval process, and although Organisations have a choice as to whether they opt to use this, the Automatic IAT process is the most efficient and effective way to transfer staff details without the need for manual initiation and matching.

#### 3.1. Key Points

Recognising the importance of how integral the recruitment and transfer of employee information is, please see below how to access information to ensure that individuals and Organisations are fully aware of all the latest ESR developments.

<b>ESR Hub</b>	<a href="https://my.esr.nhs.uk/">https://my.esr.nhs.uk/</a>
<b>X (Twitter)</b>	<a href="https://twitter.com/nhsesr">@nhsesr</a>
<b>ESR News Subscriptions</b>	<a href="http://www.esrnews.nhs.uk/subscribe">http://www.esrnews.nhs.uk/subscribe</a>
<b>ESR BI Updates</b>	Enter your e-mail address on the introduction dashboard in ESR BI.
<b>ESR User Manual</b>	<a href="https://my.esr.nhs.uk/esrusermanual/">https://my.esr.nhs.uk/esrusermanual/</a>

## 4. IAT BEST PRACTICE

To gain maximum benefit from utilising the Automated Initiation of IAT the following points should be noted:

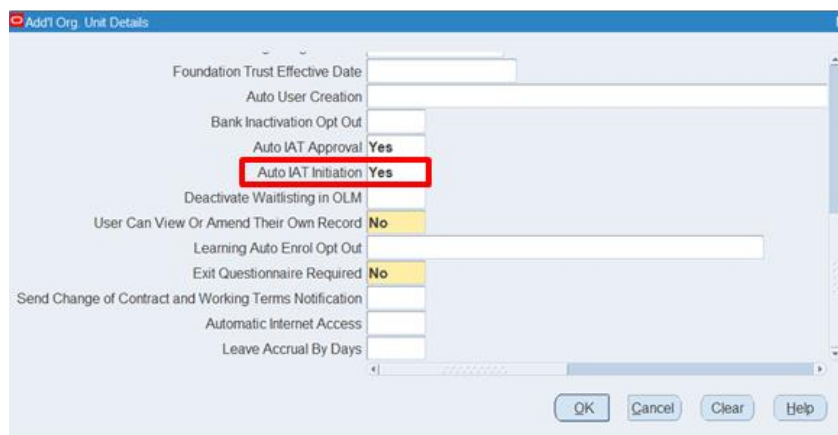
- Ensure that you have assigned the relevant employees as Role Holders to receive Pre-Employment Notifications. This will ensure that the relevant staff gain the information they need during the onboarding
- The IAT should be initiated, either automatically or manually as soon as the applicant is transferred via a 3rd party e-Recruitment interface or manually entered onto ESR
- IAT only needs to be initiated once during the recruitment process
- The information transferred in the process is the ESR information as at day of transfer
- Once the applicant becomes an employee the Portable Data Set should be copied

## 5. AUTOMATED INITIATION OF IAT

The notes and guidance in this document detail the information required to maximise the benefits of using the ESR Inter Authority Transfer process. Please note that only the automated initiation process is covered within this section. Please refer to the ESR User Manual for an overview of the IAT Process. Click [here](#) to access.

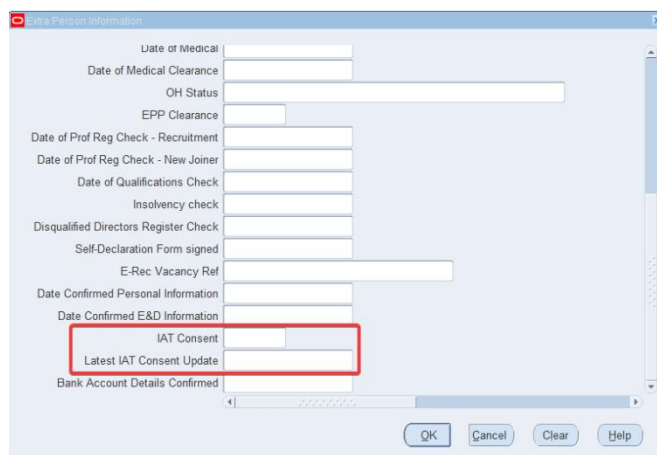
The “Auto IAT initiation” setting in the Local Workstructures Administration URP is set to Yes by default. The setting is shown in the screenshot below and can be found using the following path:

N > Organisation > Description > [enter Type of Trust] > DFF > 'Auto IAT Initiation.



The screenshot shows a window titled 'Add1 Org. Unit Details'. It contains a list of settings with corresponding input fields or dropdown menus. The 'Auto IAT Initiation' setting is highlighted with a red box and is set to 'Yes'. Other settings include 'Auto IAT Approval' (Yes), 'Deactivate Waitlisting in OLM', 'User Can View Or Amend Their Own Record' (No), 'Exit Questionnaire Required' (No), 'Send Change of Contract and Working Terms Notification', 'Automatic Internet Access', and 'Leave Accrual By Days'. Buttons for 'OK', 'Cancel', 'Clear', and 'Help' are at the bottom.

When an applicant record has the IAT Consent field on the Employment Checklist Details updated (shown in the screenshot below), a process is initiated, and the applicant record is automatically matched with an existing ESR record.



The screenshot shows a window titled 'Esra Person Information'. It contains a list of fields for personal and medical information. The 'IAT Consent' and 'Latest IAT Consent Update' fields are highlighted with a red box. Other fields include 'Date of Medical', 'Date of Medical Clearance', 'OH Status', 'EPP Clearance', 'Date of Prof Reg Check - Recruitment', 'Date of Prof Reg Check - New Joiner', 'Date of Qualifications Check', 'Insolvency check', 'Disqualified Directors Register Check', 'Self-Declaration Form signed', 'E-Rec Vacancy Ref', 'Date Confirmed Personal Information', 'Date Confirmed E&D Information', and 'Bank Account Details Confirmed'. Buttons for 'OK', 'Cancel', 'Clear', and 'Help' are at the bottom.

Where an applicant has given consent to their employment record being transferred via IAT in a 3<sup>rd</sup> Party Recruitment system the fields (IAT Consent and Latest IAT Consent Update) highlighted in the screenshot above will not need to be completed as they will be populated by the e-Recruitment interface.

This replaces the need to manually search for and find a matched record from within ESR based on the following requirements:

- The organisation creating/updating the application record has opted into Auto IAT Initiation
- The application status is one of the following:
  - Preferred Applicant
  - Offered Post Conditional
  - Offered Post Unconditional
  - Offer Accepted
- The process is enabled where a 100% match has been found against the person's NI number, Date of Birth and last Name
- Doctors in Training may also be matched using Date of Birth and Professional Registration number only
- The source trust where the Portable Data Set (PDS) is being requested from has opted into Auto IAT Approval for this to be possible
- All the relevant IAT role holders are in place - the source trust must have someone in the IAT Initiator role and the target trust must have someone in the IAT approver role.
- To send automatic reference requests there must also be someone in the Reference Receipt role in the source trust and someone in the Reference Approval role in the target trust
- The IAT Consent segment on the Employment Checklist Details (shown below) has been set to 'Yes' for the applicant record being created/updated (with the exception of Doctors in Training).

Where all the above criteria are met then the IAT will be initiated automatically.

The IAT will always be requested from the most recent record:

- Current employee record with the most recent period of service
- Ex-employee record with the most recent period of service

Reference request notifications will also be generated as part of the process. Notifications are sent to the Reference Receipt and Approval Role Holders. Please see IAT Process Flow in Section 6.

## 6. ROLES ASSOCIATED WITH IAT

To allow the delivery of IAT Workflow Notifications and Actions, and ensure that the maximum benefit is received users should be assigned to the various roles as follows:

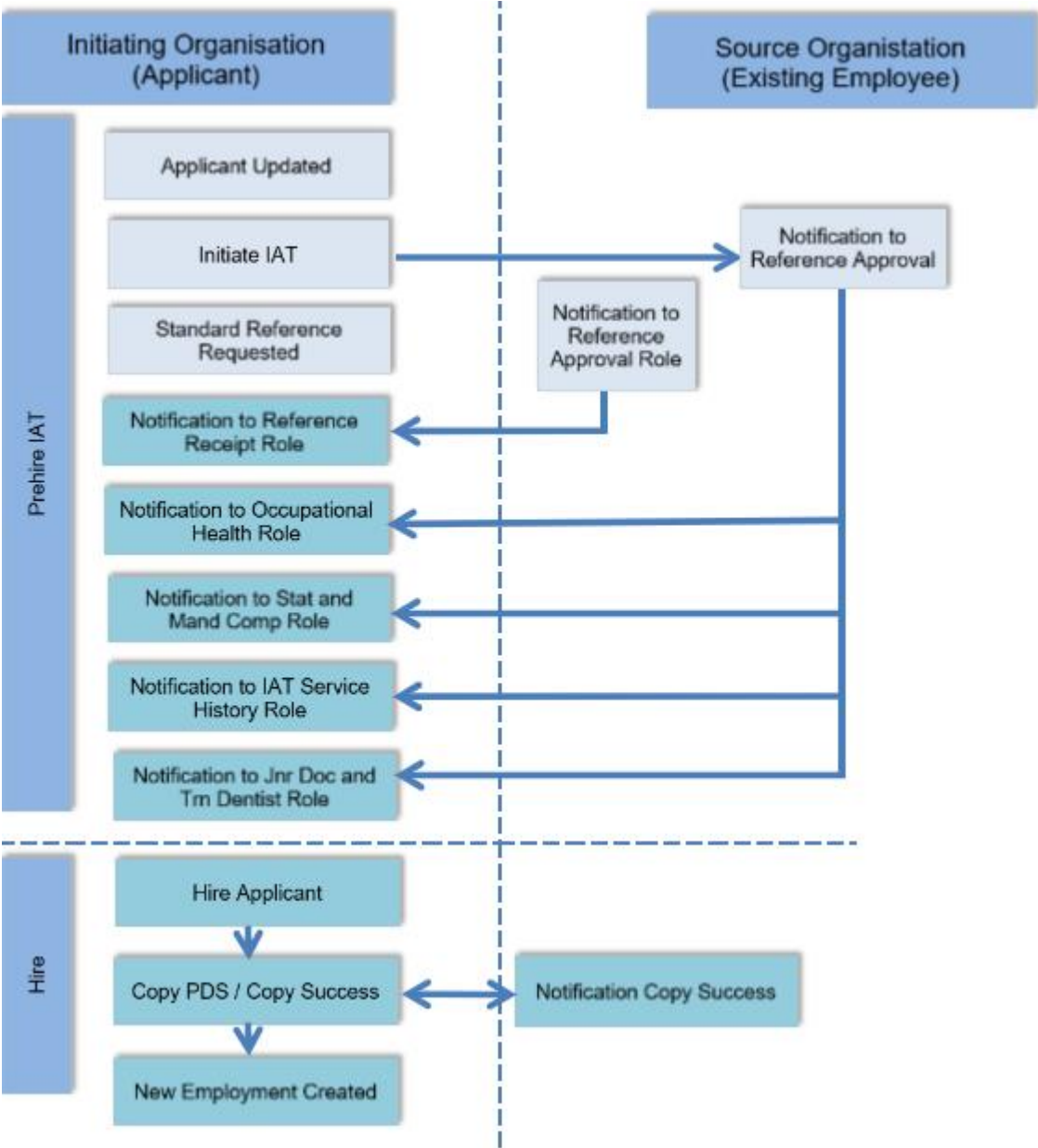
Role / User Responsibility Profile	Details
IAT Initiator Role	When a non-automated IAT request is approved, the Portable Data Set Request Authorisation notification will be delivered to all members of this role. Where the IAT is approved by the Auto IAT process the Portable Data Set Request Authorisation notification is sent to the initiating user and not all IAT Initiation Role Holders.
IAT Approver Role	The holder of this role can approve requests for IAT. They will also be able to perform PDS Copy for Self Service hires.
PDS Notification Role	Users in this role will have the option to perform the PDS Copy when hiring an applicant. When the IAT Process is run, the Portable Data Set Request Authorisation notification will be sent to the role holder where this has been populated.
Reference Receipt Role	Role holders will receive a notification from the Reference Approver at the approving Organisation advising if the reference request has been approved or rejected. Where approved this will include a copy of the standard reference form.
IAT Service History Role	This role holder will receive the IAT NHS Service History Notification with details of the consolidated service history for an employee.
Reference Approver Role	The role holder will receive a notification entitled 'Request for Standard Reference Information' and is required to approve/reject the request, validating and populating the applicant information as required.

Stat & Mand Competencies Ntf Role	The IAT process will transfer any statutory and mandatory competencies to Role Holders at the pre-hire stage for assessment.
Occupational Health Admin Role	This role holder will receive notification of OH information generated through the IAT process at the pre-hire stage.
Jr Doc & Trn Dentist Contract Role	This role holder will receive a notification when Junior Doctors and Trainee Dentists are transferred to an Organisation with the values for the following elements held by the employee: <ul style="list-style-type: none"> <li>• Cash Floor Protection NHS</li> <li>• Annual Leave Appointment NHS</li> </ul>

# 7. IAT PROCESS FLOW

The following diagram illustrates a high-level view of the information transferred as part of a best practice recruitment and hire process in ESR:

Fig 1.



# 8. IAT PRE-HIRE INFORMATION

Using the Auto IAT Initiation process at the pre-employment stage enables the transfer of a number of different data sets relating to:

- Occupational Health
- National Competencies
- Reference Requests



There is no change in the IAT process although to take advantage of the information available at the pre-hire stage, users must just ensure that the appropriate individuals have been assigned to the relevant roles as shown in Fig 1 Section 6 and that any necessary settings in ESR have been completed.

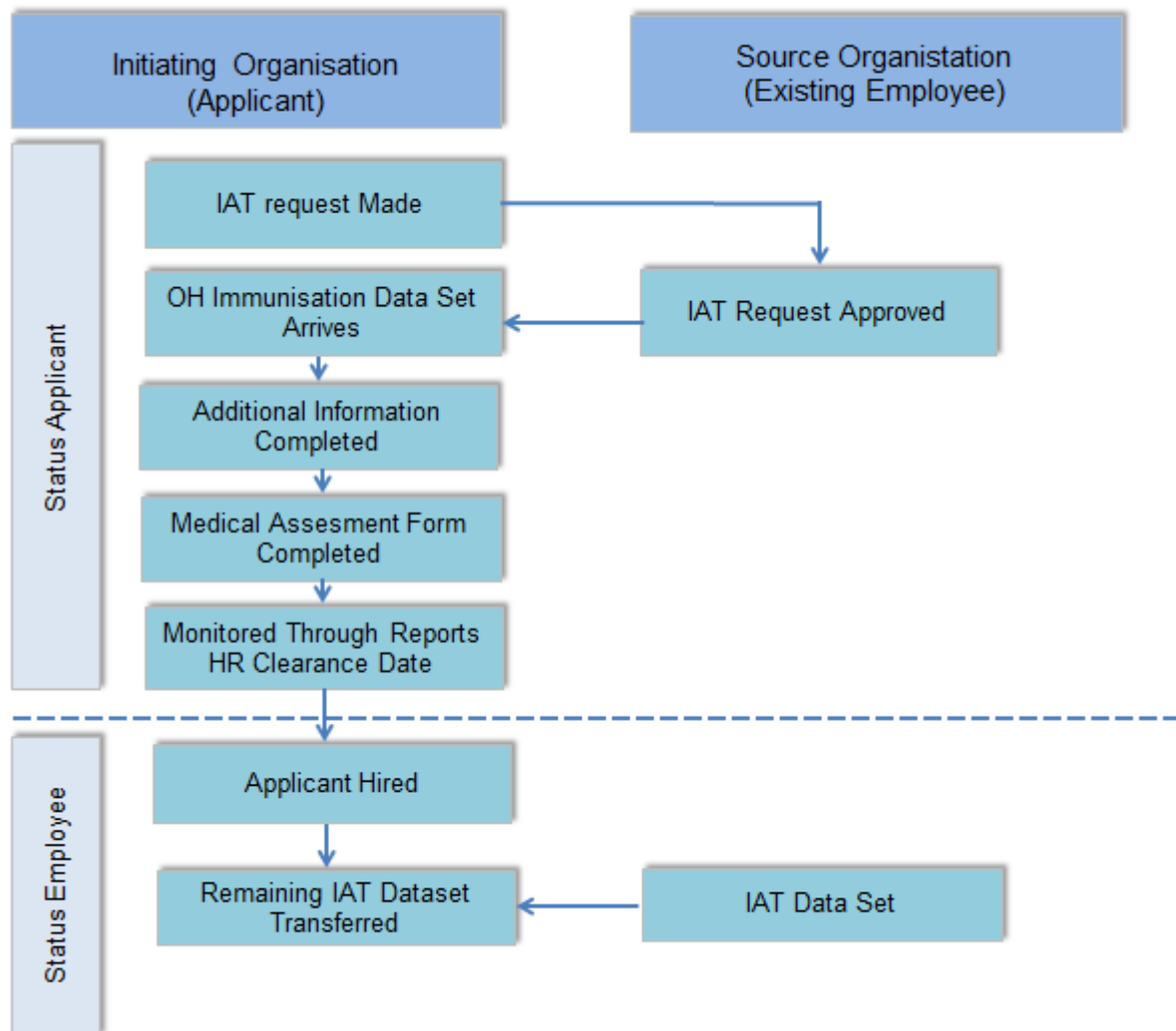
## 8.1. Occupational Health: Immunisations and Checks

To ensure that OH data is transferred the 'Eligible for OH Processing' field on the 'Additional Position' information is set to 'Yes', this can be done using the Local Workstructures Administration URP.

Using the Auto IAT Initiation will ensure that the Occupational Health IAT dataset is available to Occupational Health users prior to hire and enable them to progress the applicant's medical clearance.

It should also be noted that IAT users are not able to see the OH data that is transferred, this can only be viewed by holders of the Occupational Health Admin Notification Role. The illustration below highlights this process:

Fig 2.



An example of the Occupational Health Notification is shown below:

## Pre-IAT FYI Notification for Richard Perkins

[OK](#)
[Copy OH Assessment Data](#)
[Reassign](#)

To: XXHR\_IAT\_ADHOC\_OH\_APPROVER8  
 Sent: 17-Jan-2019 10:23:57  
 ID: 348749

An IAT request has been approved for Richard Perkins from 503 ESR Hospitals NHS Trust.

### Basic Person

Applicant Number: 18794  
 Employee Number:  
 Date Of Birth: 01-MAR-1975  
 NI Number: NS304050C

As part of the occupational health pre-employment checking process, the following occupational health data has been transferred and copied across for this person.

No Tuberculosis immunisation information on record.

No Hepatitis B Injection information on record.

No Hepatitis B information on record.

No Hepatitis C information on record.

No Varicella immunisation information on record.

No Typhoid immunisation information on record.

### NHS OH Latex Details

Latex Allergy/RAST Confirm Dat	Type 1	Type 1V
01-FEB-2017	No	No

No Body Fluid Inoculation Incident information on record.

### NHS OH Hep A Injections

Injection 1 Date	Injection 1 Class	Injection 2 Date	Injection 2 Class
01-FEB-2014	0 - Full Date		

No Influenza vaccination information on record.

### NHS OH DTP Details

DTP Immunisation	DTP Immunisation Class	Diphtheria Immunisation	Diphtheria Immunisation Class	Tetanus Immunisation	Tetanus Immunisation Class	Polio Immunisation	Polio Immunisation Class	Number of DTP Injections
01-FEB-2017	0 - Full Date	01-FEB-2017	0 - Full Date	01-FEB-2017	0 - Full Date	01-FEB-2017	0 - Full Date	

## NHS Occupational Health Assessment Details

The following data items can be copied from the previous employer. To add these items please click the Copy OH Assessment Data button.

OH Record Date	Assessment Type	OH Status	OH Conditions	EPP Clearance?	OH Clearance Unit	Medical Clearance Date	EPP / OH Review Date
01-FEB-2017	Health Assessment - Recruitment	Cleared		Yes		01-FEB-2017	01-FEB-2017

All available OH data has been copied across for this person.

## 8.2. Transfer of National Competencies

Details of any Statutory and Mandatory (MAND), Core Skills Training Framework (CSTF) and Care Certificate Framework (CCF) competencies an applicant already has can be edited and transferred following the Auto IAT Initiation.

A pre hire IAT FYI Notification will be sent to the 'Stat & Mand Competencies Ntf' Role holder, before the applicant is hired, for action. If the NHS Organisation does not have any users in the Stat & Mand notification role then the competencies will be transferred post hire as part of the PDS Copy and no changes will be possible.

The notification will detail any competencies with a national framework type of MAND, CSTF or CCF that the applicant has and the competence Requirements for the Position the Applicant is being hired into.

The role holder must approve, reject or edit the competencies being transferred (by clicking the Update Competence Form link on the notification). If they do not carry out any action then the competencies will not be transferred.

This notification is sent for Applicants with the following status:

- Offer Accepted
- Preferred Applicant
- Offered Post Unconditionally
- Offered Post Conditionally

### 8.2.1. Editing Competencies

The role holder must assess which competencies are to be accepted or rejected, placing a tick next to those competencies which are being accepted, and unticking those being rejected. The competence type displayed in the notification identifies the source; those marked as IAT are the national competencies already held by the applicant, whilst those marked as REQ are the requirements defined against the position for which they are applying. The Valid To dates of any accepted competencies may also be amended if required.

An example of how the functionality is intended to help NHS Organisations has been provided below:

An applicant has NHS|MAND|Fire, but your Organisation uses NHS|CSTF|Fire. If the MAND version is considered to be an acceptable equivalent to the CSTF version in your Organisation then, untick the 'IAT' competency, tick the 'REQ' version and enter the appropriate dates. This effectively converts the applicant's existing competency into one that meets the requirements in your own Organisation and will mean they are compliant on the compliance and competence matrix and also in any reports.

Once any competencies have been approved or edited via the form and submitted, no further changes can be made to competencies with the above national framework types and any updates made at the source Organisation will not be included in the PDS Copy.

It is also possible to create a local version of the Stat & Mand Notification role. The role can be assigned to Organisations using the Stat & Mand Competence Role field on the Organisation DFF. Assigning a role to an Organisation will assign it to all Organisations beneath it in the Organisation hierarchy, unless they are overwritten at a lower level.

Notifications for applicants to positions in Organisations with a local role assigned will then be sent to the local role holder for action. Where an Organisation has no local roles assigned to it, either directly or at any point above it in the hierarchy, then the national role will continue to be used.

An example of the IAT Update Competency Notification is shown below:

Worklist >  
**IAT Update Competence Message for Mr. IAT**

To: XXHR\_IAT\_ADHOC\_COMP\_APPROVER3973955  
 Sent: 20-Aug-2018 14:55:21  
 ID: 480901658

Inter Authority Transfer - National Competencies.

508 Organisation have given approval for the update of the following National Competencies for the following person to take place.

Last Name: IAT  
 First Name:  
 Title: Mr.  
 Applicant Number: 9295504  
 Employee Number: 60000384

Position Number: 27526332  
 Role: Staff Nurse  
 Staff Group: Nursing and Midwifery Registered  
 Organisation: 508 Ward A

Competency Name	Proficiency Level	Valid From	Valid To	Status	Date Last Awarded	Awarded By	Title
NHS(CSTF)Safeguarding Children (Version 2) - Level 1 - 1 Year	1 - Assessed	01-Oct-2017	30-Sep-2018			User	
NHS(MAND)Adult Basic Life Support - 1 Year		01-Oct-2017	30-Sep-2018			User	
NHS(MAND)Blood Transfusion - 1 Year		01-Dec-2017	30-Nov-2018			User	

Competency Name	Low	High	Essential	Date From	Date To
NHS(MAND)Adult Basic Life Support - 1 Year			Y	01-Jan-2010	
NHS(MAND)Aseptic Non Touch Technique - 1 Year			Y	01-Jan-2010	

Key:  
 Indicates that the Competence will expire within the next 3 months  
 Indicates that the Competence will not expire within the next 3 months

Num	Action Date	Action	From	To	Details
1	15-AUG-2018 14:49:17	Submit	User	XXHR_IAT_ADHOC_COMP_APPROVER3973955	

References

[Competence Update Form](#)

Return to Worklist  
 Display next notification after my response

An example of the IAT Competence Management Form is shown below:

**IAT Competence Management**

Applicant Details

Last Name: IAT  
 First Name:  
 Title: Mr.  
 Applicant Number: 9295504  
 Employee Number: 60000384  
 Position Number: 27526332  
 Role: Staff Nurse  
 Staff Group: Nursing and Midwifery Registered  
 Organization: 508 Ward A

Competency Information

Only selected rows will be transferred

Type	Competency Name	Proficiency Level	Valid From	Valid To	Status	Date Last Awarded	Awarded By	Title
<input checked="" type="checkbox"/>	IAT NHS(CSTF)Safeguarding Children (Version 2) - Level 1 - 1 Year	Assessed	01-Oct-2017	30-Sep-2018			User	
<input checked="" type="checkbox"/>	IAT NHS(MAND)Adult Basic Life Support - 1 Year		01-Oct-2017	30-Sep-2018			User	
<input checked="" type="checkbox"/>	IAT NHS(MAND)Blood Transfusion - 1 Year		01-Dec-2017	30-Nov-2018			User	
<input type="checkbox"/>	REQ NHS(MAND)Adult Basic Life Support - 1 Year							
<input type="checkbox"/>	REQ NHS(MAND)Aseptic Non Touch Technique - 1 Year							

Competency Requirements for the position

Competency Name	Low	High	Essential	Date From	Date To
NHS(MAND)Adult Basic Life Support - 1 Year			Y	01-Jan-2010	
NHS(MAND)Aseptic Non Touch Technique - 1 Year			Y	01-Jan-2010	

Current Competency Details for the person

Competency Name	Proficiency Level	Valid From	Valid To	Date Last Awarded	Awarded By	Title	Last Updated By
No results found.							

Key:  
 Indicates that the Competence will expire within the next 3 months  
 Indicates that the Competence will not expire within the next 3 months

### 8.3. Reference Requests

As previously stated, a reference request is generated when the Auto IAT is initiated.

The reference is based on the templates outlined in NHS Employers guidance on obtaining reference requests and employment history.

Upon receipt of a reference request the Reference Approver role holder will be presented with a standard reference form pre-populated with a number of fields from ESR.

Reference Approvers can then review, validate and amend any information and include additional supporting information where required, or where this information is not available from ESR.

Where Employee Relations information is present on the employment record, an indicator is included on the reference notification to inform the approver of this.

Upon completion and approval of the reference, a notification is sent back to the requesting NHS Organisation and delivered to the 'Reference Receipt' role holder.

Please note that if there are multiple role holders the first of these to approve the request will result in any other copies of the reference request being closed.

## 9. PORTABLE DATA SET (PDS) RULES AND NOTES

### Training and Learning Information

Completed national courses will be transferred to the learning history record; any locally completed courses are transferred to the external learning tab unless the successful applicant is an internal applicant. The information transferred as part of the portable data set will be identified as IAT.

All open national e-Learning enrolments will be transferred from the previous employer to allow the employee to continue to play the class. Where an employee is subscribed to a nationally created learning path the full learning path will also be transferred.

Only national competencies are transferred as part of the PDS copy process,

### Redundancy Payment Received

Using the calendar month that the actual termination date (of the source record) falls in as the 'current' month, ESR will check if there is an element entry for an element matching "Redundancy Pay NR % NHS" within a date range of +/- 2 whole calendar months of the 'current' month. This provides for a potential 5 calendar month window to search in.

If an element entry is found "Yes" will be displayed in this field, otherwise it will be left blank. Note that the element entry merely needs to exist within this search time-frame; the entry does not have to have been processed.

### Payroll Information (Elements)

The Distinction Award element is only transferred if the IAT process is completed prior to the end date of the previous employment.

Advice from NHS Pensions is that the SD Number should only be used for recently terminated, pensioned employments. If there is a lengthy gap between pensioned employments it may be that the employee has had a refund and the SD Number is no longer be applicable to that employee.

### Service Dates

Date of Entry to NHS does not take into consideration any breaks in service.

The Previous Employing Authority Pension End Date is the date the pension payments ceased, which can be after an employee has left the previous Employing authorities as a result of unused annual leave etc.

CSD 1 Week is not transferred in the PDS but given for information on the PDS Request Authorisation Notification. The date is a marker from which the 104 week qualifying period for redundancy pay is calculated. This needs to be identified and established for all new starters to identify any who have taken unpaid time between employments.

CSD 3 and 12 Months are calculated at the point of transfer to determine if there was a gap in service between the leaving date at previous NHS Organisation and starting at the new one. Where this occurs the CSD is adjusted accordingly and overwrites the dates (if any) in the destination NHS Organisation. The receiving NHS Organisation may change these dates if required after the PDS has been transferred.

Continuous service dates are also included in the Pre-Hire Service History Notification.

Loss of Office Payment Date shows that payments (Redundancy, VSS, MARS) have been made up to and including that date. Any entries in this field will not overwrite any existing date.

The Reckonable Service Date represents a marker from which any future reckonable service for redundancy, or loss of office payment is calculated from, in conjunction with CSD 1 Week, that would commence from the same date. No existing data will be overwritten.

NHS Pensioner identifies employees who have received or are in receipt of benefits from the NHS Pension Scheme.

Date NHS Pension Benefit Paid to is linked to the redundancy rules to ensure that reckonable service and continuous service are correctly established for any future redundancy calculations.

### **Recruitment**

Recruitment Source is set to NHS Organisation and populated with approving Organisations' details.

### **Extra Information**

The information held in the Registrations & Memberships EIT is only matched against the Professional Body/Number and Expiry Date.

### **Absence**

When the IAT Portable Data Set is copied, 12 months of sickness data is also transferred automatically to the employee's record. A workflow notification and the detailed PDS report will advise the user when no Occupational Sick Pay (OSP) data has been transferred as part of the PDS.

Absence reasons are not transferred.

Absence information will be copied into an Occupational Sick Pay Transfer area, for validation and acceptance by IAT Initiator.

This data can be viewed using the Inter Authority Transfer Initiation URP:

N > IAT OSP Transfers > Select Employee > Absence History

This process does not enter actual absence records (which is done as part of the PDS copy). The purpose of this process is to adjust the employee's entitlement to account for the total days the employee has been absent in the last 12 months.

After the PDS has been copied, each period of absence is shown as a separate entry on the OSP form. Users can review the contents to establish which periods of absence actually affect OSP entitlement in the new Employing Authority. Click on the 'Valid' check box for each valid absence period which will then be deducted from the employee's entitlement.

## **9.1. Receiving Workflow Notifications**

A number of notifications are generated as part of the IAT process.

The Auto IAT process generates the following notifications:

1. An authorisation notification which is sent directly back to the initiator or designated role holders enabling them to copy the Portable Data Set once the person becomes an employee. The process runs hourly, on the hour.
2. A Completion Notification – this is sent once the PDS has been copied. Both the Previous Employing Authority and the Requesting Employing Authority will receive a copy of this notification.

3. Once the notification has been read/actioned by one of the holders it will no longer be available for selection by any others. Role holders need to be aware of this and ensure that once the request is marked 'OK', they should then also complete all necessary actions.

IAT Initiation and PDS role holders should check regularly for notifications and view the details of these. The Initiator's contact details are included, as is a quick link to the IAT Person Matching form – this is located in the References section of the notification as shown below:

**Inter Authority Transfer - Portable Data Set Request Gerald Cruise**

**Information**  
This notification does not require a response.

To: XQHR\_IAT\_ADHOC\_IAT\_APPROVER16  
Sent: 14-Sep-2017 07:50:19  
ID: 349563  
504 ESR Hospitals NHS Trust have made an offer of employment to Gerald Cruise and they have stated that they are currently / were last employed within the NHS at 502 ESR Hospitals NHS Trust.

**Initiator Details**  
Contact Name: Leese, Mrs. Vivian (504TRAIN21)  
Contact Number:  
Contact Email:  
Comments:

**Basic Appointee Details**  
Last Name: Cruise  
First Name: Gerald  
Title: MR.  
Known As:  
Date Of Birth: 01-JAN-1950  
NI Number: NS121212C  
Professional Registration No (if applicable):  
Unique NHS Identifier: 20893

You are requested to allow the transfer of this information to 504 ESR Hospitals NHS Trust. 504TRAIN21 has confirmed that the person referred to above has given permission to perform this data copy.

The attached link will take you to the IAT matching form.

**References**  
[Employee Match Form](#)

**Return to Worklist**  
 Display next notification after my response

OK Request Information

## 9.2. Receiving the Portable Data Set

Once the process for the approval of the IAT has completed and the Applicant has been hired on their start date, the IAT Initiator role holder or designated PDS Notification role holder at the requesting Employing Authority will receive a workflow notification advising that the Portable Data Set is available.

If the applicant is being hired via HR or Self Service URP the user is a designated PDS Notification role holder and there is an open IAT they will be given the option to perform the PDS Copy.

It is also possible to customise this role to suit localised business processes e.g. assigning the role to different levels within the hierarchy.

If the Requesting Employing Authority is satisfied that this is the correct person the copy can be completed by clicking on the Perform Portable Data Set Copy button.

Key Points:

- This can only be completed for Employee records.
- The employee's record in the Requesting Employing Authority will then be updated with the information contained in the Portable Data Set.
- The copy process can take up to two hours and uses the latest data from the person's record, regardless of when the IAT was actually initiated.

An example of the Workflow Notification is shown below:

The screenshot shows a workflow notification interface. At the top, there is a blue header with the NHS logo and 'Requests' text. On the right side of the header, there are navigation icons for Home, Navigator, Favorites, and Settings, along with the text 'Logged In As 504TRAIN01' and 'Help Logout'.

The main content area has a title 'Inter Authority Transfer - Portable Data Set Request Authorisation Penelope Pitstop'. To the right of the title are three buttons: 'Cancel', 'Perform Portable Data Set Copy', and 'Request Information'.

The notification text includes:

- To: X08HR\_IAT\_ADHOC\_INITIATOR6
- Sent: 25-Jan-2018 13:28:05
- ID: 347489
- This message has been resent, as stated the requested person must be of type Employee in order for the IAT process to continue.
- Inter Authority Transfer - Portable Data Set Request Authorisation Penelope Pitstop
- Appointee Name: Penelope Pitstop
- Employee Number:
- 503 ESR Hospitals NHS Trust have given approval for the copy of the Portable Data Set for the following person to take place.

**Basic Person**

Last Name:	Pitstop
First Name:	Penelope
Known As:	
Title:	LADY
Date Of Birth:	01-JAN-1960
Ni Number:	NE123456D
Professional Registration No:	
Unique NHS Identifier:	19679

**DBS/CoGS Details (For information only - not part of PDS)**

Type of DBS Disclosure	Date DBS/CoGS Received	DBS Disclosure Issue Date	DBS Unique Number	DBS Check Outcome
No Values				

**Statutory Benefits Entitlement**

CSD 1 Week (for information only):
Loss of Office Payment Date:
Loss of Office Reckonable Service Date:



Name of Current Employer: 503 ESR Hospitals NHS Trust  
 Continuous Service Date 3 Mth:  
 Continuous Service Date 12 Mth:

**Medical Appraisal Details**

Review Type:  
 Period Start Date:  
 Period End Date:  
 Review Date:  
 Next Review Date:

**Assignment History\***

Date From	Date To	Assignment No	Job Title	Grade	Point	Salary WTE	Primary Incremental Date
18-DEC-2017	20109607		Nursing and Midwifery Registered - Enrolled Nurse NH5(NP26)/Nurse - Scale D (Second Level)			1.00	Yes

The Portable Data Set copy can only be copied when the person has started working for you. Please select the 'Perform Portable Data Set Copy' action once you have an employee record.  
 \* Note that the number of lines of Assignment History in the approval will be limited to 25. All Assignment History lines, however, will be copied as part of the Portable Data Set.

**Action History**

Num	Action Date	Action	From	To	Details
1	25-JAN-2018 10:59:56	Submit	Leese01, Vivian	XX0HR_IAT_ADHOC_INITIATOR6	
2	25-JAN-2018 11:12:17	Perform Portable Data Set Copy	Leese01, Vivian	Workflow System	
3	25-JAN-2018 11:13:30	Perform Portable Data Set Copy	Leese01, Vivian	Workflow System	
4	25-JAN-2018 13:27:48	Perform Portable Data Set Copy	Leese01, Vivian	Workflow System	
5	25-JAN-2018 13:28:05	Perform Portable Data Set Copy	Leese01, Vivian	Workflow System	

Return to Worklist  
 Display next notification after my response

Cancel Perform Portable Data Set Copy Request Information

### 9.3. Completion Notification

Once the PDS has been copied both the previous Employing Authority and requesting Employing Authority will receive a completion notification. The notification will be sent to the IAT Initiator in the requesting Employing Authority and the IAT Approver role at the previous Employing Authority. This notification is for information only and does not require a response.

The notification will show data held in ESR for the employee record before and after the Portable Data Set copy has occurred, and also advises if Occupational Sick Pay (OSP) data has been taken as part of the PDS. It is possible that the existing data in the employee record may be more recent and accurate than the data held by the IAT Portable Data Set, for example if this has been created using the recruitment interface.

**Note:** If the information in the Portable Data Set is different to that already held in ESR, the information in ESR will not be overwritten, with the exception of continuous service dates. This is because a calculation takes place and amends the dates where a gap in service is found between the employee's last day at their previous Trust and first day at their new Employing Organisation. These dates can be subsequently amended if required.

The notification will inform of any discrepancies between the data sets which will need to be checked. Once any differences have been verified the correct data should then be manually entered into the employee record.

## 10. IAT CHECKS AND REPORTS

A suite of reports and information relating to the IAT process is accessible to ensure that NHS Organisations have all the information they need to effectively monitor and review the transfer of employee data, as well as reviewing how the process is being used and the benefits of this.

**Note:** ESR Business Intelligence has a continuous approach to development and the reporting of IAT is recognised as being a key component of this. Reporting against IAT will therefore continue to evolve and it is recommended that Organisations ensure they are signed up to receive the latest information regarding ESR and Business Intelligence developments.

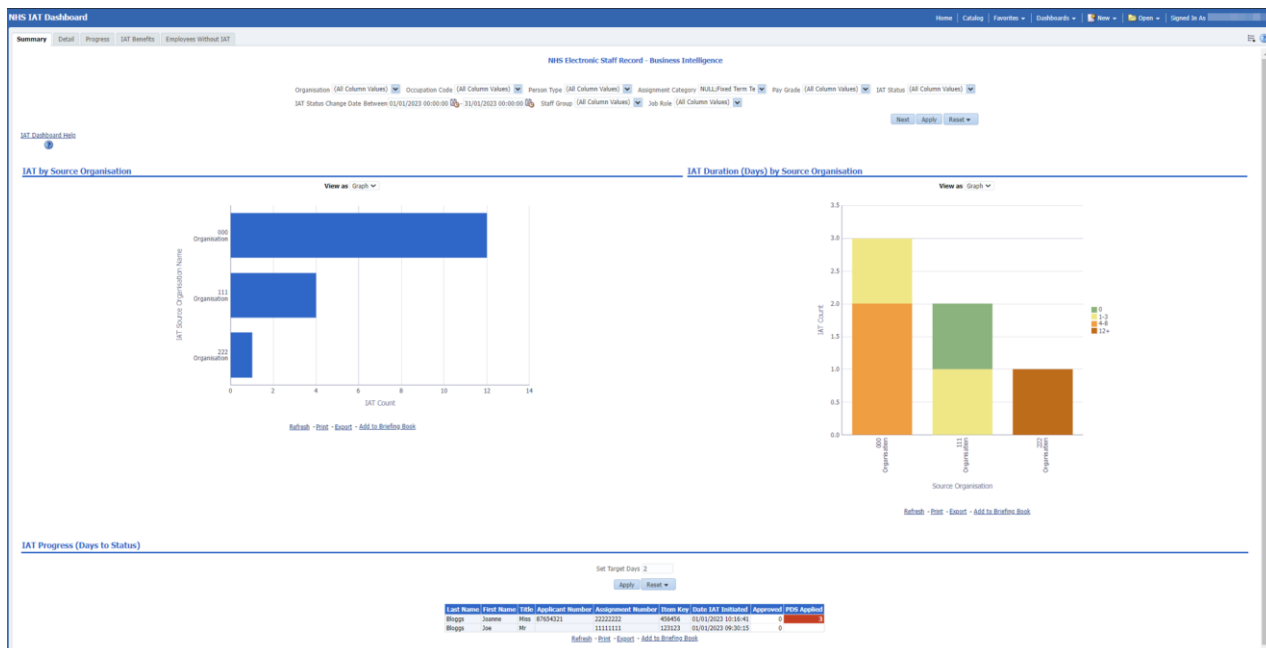
Key operational information regarding the current status and dates of the IAT is also available to HR Administration users in the NHS IAT Operations EIT which is available via the Fastpath menu > View IAT Operations EIT.

The information contained here includes:

- IAT Operation Date (Date the IAT Operation took place)
- IAT Operation (PDS Requested, Approved etc.)
- IAT Operation User (ESR User ID of the user responsible for the IAT Operation)
- Source VPD
- Destination VPD

## 11. NHS IAT DASHBOARD

The IAT dashboard in ESR Business Intelligence provides organisations with IAT usage information. This includes number of IATs run, length of time to return IAT requests and source organisation. Summary and detail versions are provided to allow further analysis as shown below:



The dashboard contains the following pages:

### Summary

Contains a number of analyses designed to give users high level summary information of the organisation's IAT usage.

### Detail

This analysis is designed to show full details of all IATs returned within the defined period. Please note that an applicant number is only returned where an employee has an associated applicant record.

### Progress

This tab contains a number of analyses designed to give users details of IAT progress dates and those of applicants without an IAT.

Further information is available in the Guide to NHS IAT Dashboard available on the ESR Hub within the Reporting folder.

## 11.1. NHS IAT Operations Analysis

ESR Business Intelligence also has a tab dedicated to displaying IAT information within the Staff Movements Monitoring Dashboard, as shown below:

Detail										
Employee Number	Employee Name	Organisation Name	Staff Group	Hire Date	Position Name	IAT Operations Date	IAT Operations Operation	IAT Operations User	IAT Operations Source VPD	IAT Operations Destination VPD
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Additional Clinical Services	22/02/2016	17771888 R&D Medical Facilitator G1B Research and Development			504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Additional Clinical Services	07/03/2016	17771888 R&D Medical Facilitator G1B Research and Development	18/03/2016	Approved	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	01/01/2016	17771888 R&D Medical Facilitator G1B Research and Development	07/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888 R&D Medical Facilitator G1B Research and Development	05/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888 R&D Medical Facilitator G1B Research and Development	07/01/2016	PDS Applied	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888 R&D Medical Facilitator G1B Research and Development	08/01/2016	Approved	504MSMITH07		
12345678	Jones, Miss Lily Elizabeth	504 M500 ESR Medical Administration	Administrative and Clerical	04/01/2016	17771888 R&D Medical Facilitator G1B Research and Development	26/01/2016	PDS Applied	504MSMITH07		

The full list of IAT Operations is:

- PDS Requested
- Approved
- No Match Found
- No IAT Approver
- Request Timed Out
- PDS Copy Failed
- PDS Applied
- PDS Taken

The Staff Movements Monitoring Dashboard is available to the following URPs:

- BI Administration
- HR Administration
- HR Management
- Finance Reporting
- Finance Reporting and Hub Mapping

## 11.2. NHS IAT Benefits Analysis

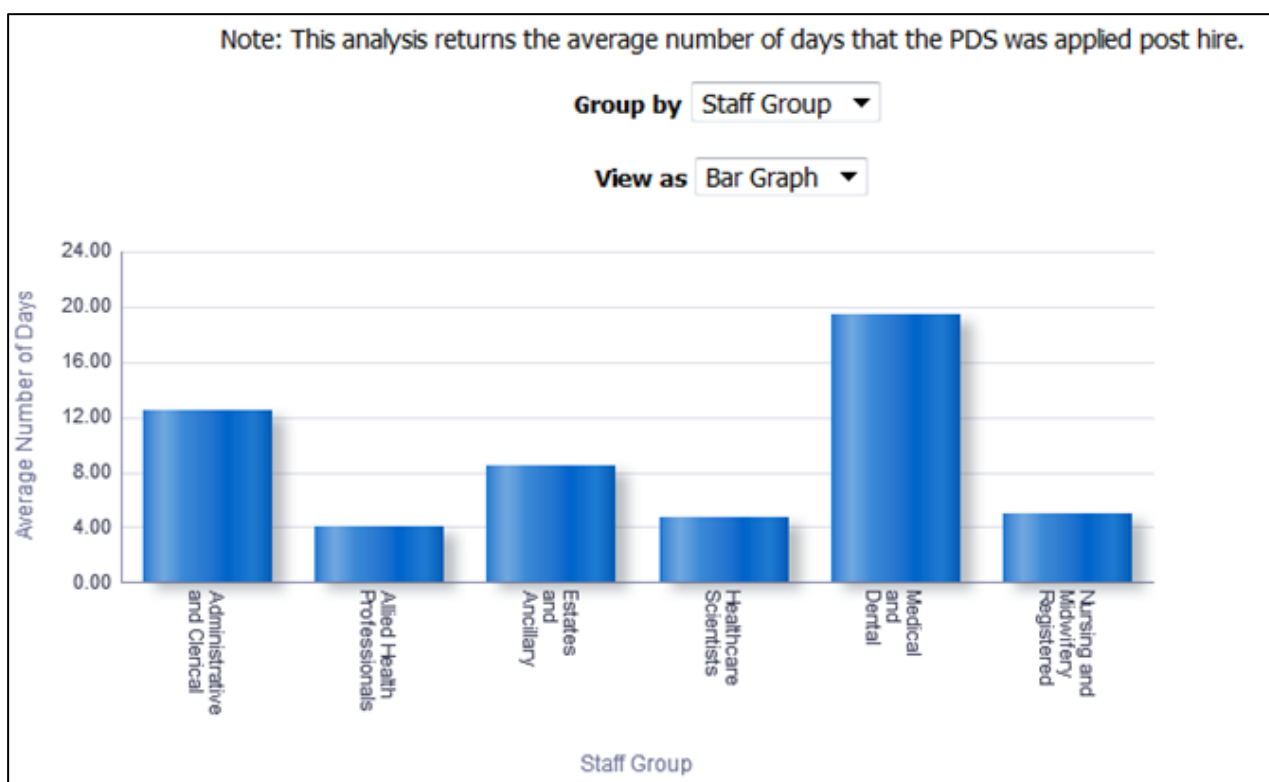
The IAT Benefits Tab in the IAT Dashboard shows a high level summary of the time and money saved by transferring competencies via IAT rather than staff having to undertake training again to achieve the same competencies. An example of the analysis is shown below:

Competency	Count of IATs	Training Time Saved (Hours)	Financial Saving
NHS CSTF Blood component transfusion: Administration of blood components - 3 Years	1	0.50	£7.70
NHS CSTF Blood component transfusion: Administration of blood components - No Specified Renewal	1	0.50	£6.19
NHS CSTF Communication, interaction and behaviour in dementia care - Tier 2 - No Specified Renewal	3	1.50	£26.91
NHS CSTF Communication, interaction and behaviour in dementia care - Tier 3 - No Specified Renewal	1	0.50	£11.19
NHS CSTF Dementia awareness - 3 Years	52	26.00	£412.16
NHS CSTF Dementia awareness - No Specified Renewal	37	18.50	£397.44
NHS CSTF Dementia identification, assessment and diagnosis - Tier 2 - No Specified Renewal	3	1.50	£26.91
NHS CSTF Dementia identification, assessment and diagnosis - Tier 3 - No Specified Renewal	1	0.50	£11.19
NHS CSTF Dementia risk reduction and prevention - Tier 2 - No Specified Renewal	3	1.50	£26.91
NHS CSTF Dementia risk reduction and prevention - Tier 3 - No Specified Renewal	1	0.50	£11.19
NHS CSTF End of life dementia care - Tier 2 - No Specified Renewal	3	1.50	£26.91
NHS CSTF End of life dementia care - Tier 3 - No Specified Renewal	1	0.50	£11.19

The calculations used here have been included in the table below for information.

Title	Description
Competency	
Count of IATs	
Training Time Saved (Hours)	Employee Count Distinct * Average Time to Complete Training (Default: 30 min) / 60
Financial Saving	(Employee Count Distinct * Average Time to Complete Training (Default: 30 min) / 60) * Average Hourly Rate

Also available in this dashboard is an analysis displaying a graphical representation, shown below, of the average number of days that the PDS was applied post hire (if any). Grouping of the information is available by Age Band, Staff Group, Job Role and Organisation Levels 1-7

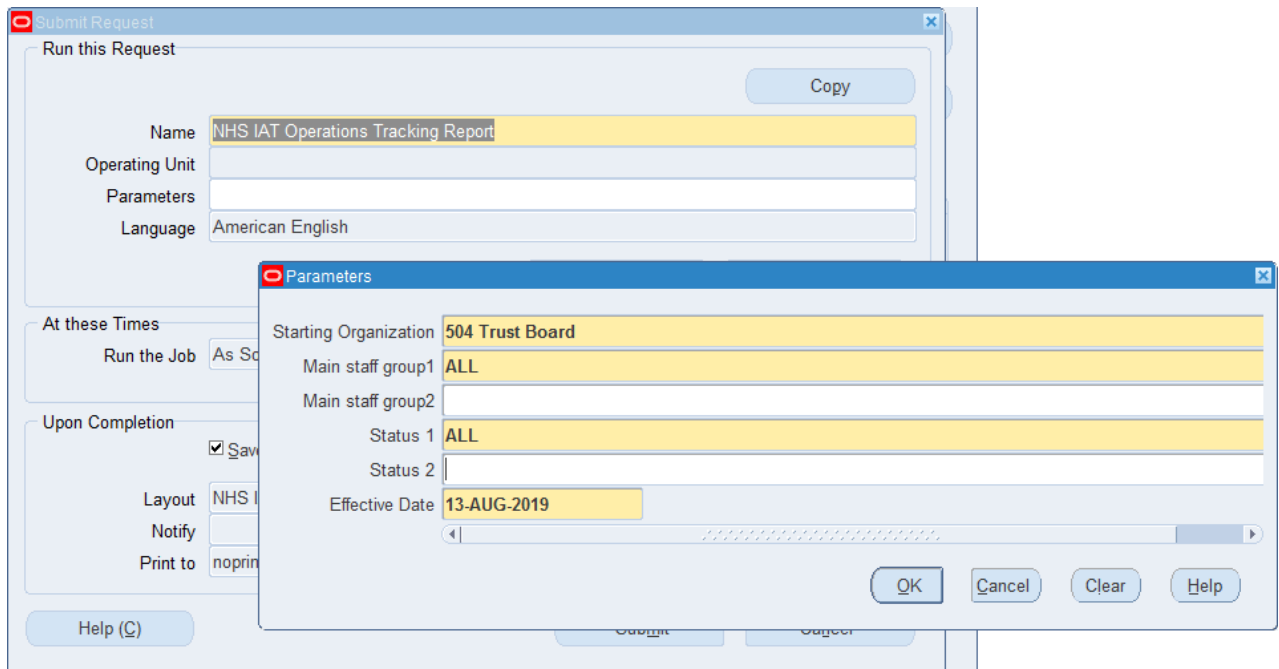


### 11.3. NHS IAT Operations Tracking Report

This report presents data from the NHS IAT Operations EIT and uses an effective date parameter to enable current or historic reporting. Other parameters can be used to restrict information by Organisation, staff group and IAT status. The report is available to the following URPs:

- HR Administration
- HR Data Entry
- HR Management
- Payroll Super Administration
- Payroll Administration
- Payroll Data Entry
- Payroll Audit
- Pensions Administration
- Occupational Health Administrator
- IAT Initiation
- IAT Approval

Report Parameters are shown below:



An example of the report is shown below:

<b>NHS Inter Authority Transfer (IAT) Report</b> <b>IAT Operations Tracking</b>									
Starting Org : T19 Medical Directorate			Effective Date: 28-Jan-2010						
Staff Group 1 : All Staff Groups			IAT Status 1 : All IAT Statuses						
Staff Group 2 : N/A			IAT Status 2 : N/A						
<b>T19 Information Management Qemc</b>									
Person Type	Number	First & Last Names	Staff Group	Initiating User	Approving Trust	Eligible for OH processing	Recruitment Source	Last Update	
Employee	20000280	Test01	Administrative and Clerical	T19CCN534I	T18	Yes	NHS Organisation	PDS Applied	28-Jan-2010
	20000283	Test04	Administrative and Clerical	T19CCN534I	T18	Yes	NHS Organisation	PDS Requested	28-Feb-2010

## 11.4. NHS IAT PDS Full Details Report


This report shows the content of a recently completed IAT PDS copy process. Personal details will show the values from the source VPD and Target VPD and indicate whether the value was updated by the PDS copy. The report is run for a single employee and shows the details of items copied across and indicates where no data was available for a specific area.

**Note:** Details will only be available to be reported upon for a period of 45 days from the successful completion of the PDS Copy process. An automated process will remove the data from the reporting storage area once 45 days have elapsed. Also note that this report does not include the Occupational Health Data transferred securely at the pre-employment stage to the Occupational Health Administrator.

The report is available to the following URPs:

- HR Administration
- HR Management
- HR Data Entry
- IAT Initiation
- IAT Approval

Example report below:

 <b>NHS Inter Authority Transfer (IAT) Report Full Portable Data Set Details</b>						
<b>Report for:</b>		CCN534, Mrs. Test06 Approved (Mandy)				
<b>Source Trust:</b>		T18 Good Hope Hospital NHS Trust				
<b>Personal data</b>						
Data Item	Value in Source Trust	Value in Destination Trust	Updated by PDS Copy?			
Last Name	CCN534	CCN534	No			
First Name	Test06	Test06	No			
Title	Mrs.	Mrs.	Yes			
Middle Names	Approved	Approved	Yes			
<b>Addresses</b>						
Style & Type	Effective Dates	Address				
GB Home	18-Feb-2010 to Present	15, IAT Street Transfer Road ESR Warwick Warwickshire CV31 3DD United Kingdom				
<b>Sickness Absence</b>						
Source	Target	Absence dates	Element Name	Days	Industrial Injury?	Element Dates
T18	T19	15-May-2009 to 15-Jun-2009	OSP Full NHS	17		15-May-2009 to 31-May-2009
T18	T19	15-May-2009 to 15-Jun-2009	OSP Half NHS	1		15-Jun-2009 to 15-Jun-2009
T18	T19	15-May-2009 to 15-Jun-2009	OSP Full NHS	14		01-Jun-2009 to 14-Jun-2009
<b>Portable Special Leave</b>						
Start Date	End Date	Days				
30-Dec-2009	06-Jan-2010	8				

### Most recent previous employment

Employer: T18 Admissions Office

Employer Address	Good Hope Hospital NHS Trust, Rectory Road, , Sutton Coldfield, WTM, B75 7RR United Kingdom
Employer Type	Public Sector
Description	
Employment dates	01-Jun-2009 to
Reason for Leaving	
Regular user flag	N
Total of regular user miles	
Total of standard user miles	125

#### Related previous jobs

Job Dates	01-Jun-2009 to		
Job Name	Administrative and Clerical Clerical Worker		
Employee Cat.	Part Time	Employment Cat.	Permanent
Grade	NHS XN02 Non Review Body Band 2	Scale Pt. 70	Salary: 13944
Grade Date	28-Mar-2008	Hrs: 7.5	Inc. Date: WTE: .2
Occupation Code	Clerical and Administrative   Clinical Support		
Position	48003 Administrator Band 2 G2D Administration		
Pens Override Date	31-Oct-2009	Redundancy payment received?	N

### E-Learning data

#### National Learning Path subscriptions

Learning Path Name	NHS CCN534 Path		
Path Status	COMPLETED	Comp. Target Date	
No. completed courses	1	No. mandatory courses	1
Path Source	Administrator	Completion Status	
Progress		Completion Date	18-Feb-2010
Start Date Active	12-Aug-2009	End Date Active	

#### National Enrollments (current)

Course Name / Offering Name	Player Status	Enrollment Date & Status	Date first played	Score	Total Time (seconds)
NHS CCN534 Class 2 / NHS CCN534 Online Offering 2		18-Feb-2010 Confirmed			

#### National Enrollments (history)

Course Name / Offering Name	Player Status	Enrollment Date & Status	Date first played	Score	Total Time (seconds)
NHS CCN534 Class 1 / NHS CCN534 Online Offering 1		18-Feb-2010 Completed			

### Payroll Elements: Pension-related

#### Pension Add Yrs Full 1 NHS

Pay Value	Employee Percentage	Chosen Age	Yrs Purchased	Days Purchased	Date Worked
2.00		65	10	50	

### Payroll Elements: Others

#### Distinction Award NHS

Scheme	Allowance Type	Annual Rate	Period Cash Amount	Annual Rate	Date Worked	Commence ment Date	Review Date
NHS	Distinction Award A	2400.00	200.00	55098.00		01-JAN-2009	31-DEC-2009

#### Clinical Ex Award NHS

Scheme	Allowance Type	Annual Rate	Date Worked
NHS	CEA Level 1	2913.00	

### Registration & Memberships

Body	Membership Number	Expiry Date	Date first registered	Revalidation Date
General Medical Council	1234567	31-Dec-2011	01-Jan-2009	30-Nov-2011
Other	abc123	31-Dec-2010	01-Jan-2008	30-Nov-2010

\*\*\* End of Report \*\*\*

## 11.5. NHS IAT PDS Exceptions Report

This report contains data exceptions which may have occurred during a recently completed IAT PDS Copy process. Areas covered by this exceptions report are:

- Personal Data – items will be reported where they were provided by the source VPD but not used to update the target VPD because the value provided was different to the value already present in the target VPD.
- Address Data – this will be reported if an address was supplied by the source VPD but a (different) primary address already existed in the target VPD
- Sickness Absence – if there was no OSP data to transfer across from the source VPD then a warning message will be included to indicate this.
- Payroll Elements – if source payroll element data could not be copied across to the target VPD then these items will be reported.

Exceptions will not include any data items found in the source VPD that have an exact match in the target VPD.

The report is available by employee to the following URPs:

- HR Administration
- HR Management
- HR Data Entry
- IAT Initiation
- IAT Approval

Example report below:

**NHS** **NHS Inter Authority Transfer (IAT) Report**  
**Portable Data Set Exceptions**

**Report for:** CCN534, Dr CSD2 30day (Gill)  
**Source Trust:** T18 Good Hope Hospital NHS Trust

The following exception report contains data provided by the source trust as part of the IAT process, but which has not been used to update the person record in the target trust. Exceptions will not include any data items found in the source trust that have an exact match in the target trust. Refer to the Full PDS report for details about all data items transferred.

**Personal data**

The following personal data was provided by the source trust but has not been used to update the person record in the target trust. However the value that was provided is different to the value already in the target trust.


Data Item	Value as supplied by Source Trust	Value in Target Trust
Title	Mr	Dr



## 11.6. NHS IAT Audit Report

This report shows the IAT processes requested and received within a defined period and which of these utilised the Auto IAT process.

Example report below:

 <b>NHS IAT Audit Report</b>													
Report run: 17-Jun-2011 11:45:35													
Parameters													
Date From: 01-Mar-2011													
Date To: 17-Jun-2011													
IAT Type: Inbound and Outbound IAT													
Inbound IAT													
Last Name	First Name	Title	Employee Number	Application Number	Date IAT Initiated	IAT Initiator Name	Source Trust	Destination Trust	Date IAT Approved	IAT Approver Name	Date PDS Copied	PDS Copied by	Auto IAT Approval?
Bird	Chris	MR.	20000816		07-Jun-2011	Green, Mr. Jim	T12 Cornwall Partnership NHS Trust	T11 North East Wales NHS Trust	07-Jun-2011	Green, Mr. Jim	07-Jun-2011	Green, Mr. Jim	Yes
CCN627-IAT	Elena	MISS	20000418		13-May-2011	CCN627-IAT, Mr. Tai Jake	T12 Cornwall Partnership NHS Trust	T11 North East Wales NHS Trust	13-May-2011	CCN627-IAT, Mr. Ainsley Ricky	13-May-2011	CCN627-IAT, Mr. Tai Jake	No

## 11.7. Selected Error Messages

The majority of error messages associated with the IAT process relate to where requests are made using the manual process. The following errors are the most commonly encountered ones.

### 11.7.1. No IAT Approver at Previous Employing Authority

The IAT Initiation Request you submitted on <date> for <first name> <last name> was unable to locate an IAT process Approver at the Previous Employing Authority.

To progress your IAT request, please contact the Human Resource Department at <NHS Organisation Name> and inform them that they do not currently have an IAT Approver Role.

Once this request has been actioned, please resubmit your IAT Initiation Request.

### 11.7.2. Time Out

Your request for the Portable Data Set for <First Name> <Last Name> has timed out.

Please contact the Human Resources Department at <NHS Organisation Name> to discuss your requirement.

You should then re-try the IAT process from the point of initiation.

### 11.7.3. No Match

Your request for the Portable Data Set for <First Name> <Last Name> has been processed by <NHS Organisation Name>.

<NHS Organisation Name> was unable to locate a record meeting the match criteria for <First Name> <Last Name>, and have provided the following comments

<Comments>

Please check that <NHS Organisation Name> was a correct selection as a holder of a record for <First Name> <Last Name>.

If you are satisfied that <NHS Organisation Name> was a valid selection, please contact the HR Department at Previous Employing Authority.

If <NHS Organisation Name> was not a valid selection, identify the correct employer.

In either case, you can then re-run the IAT process from the point of initiation.

For further information on IAT Workflow Notifications can be found in the Notification document on ESR Hub.

## 12. IAT ACTIONS

This portlet provides organisations with IAT usage information. This includes number of IATs run, length of time to return IAT requests and source organisation.

**Detail**The Detail analysis is designed to show full details of all IATs returned within a defined period. This includes:

- Date IAT Initiated
- OH Notification Received
- PDS Requested Date
- Std Reference Request Returned Date
- Stat and Mand Competency Notification Received
- Stat and Mand Competency Notification Actioned Date

### IAT Progress

The IAT Progress analysis shows how an IAT has progressed across the date period defined by a user.

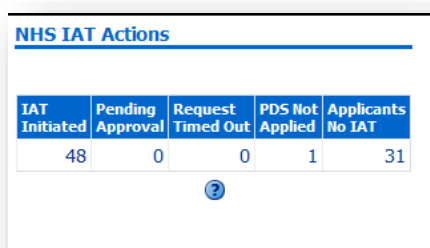
### NHS IAT Actions

To further support analysis, the IAT Actions Portlet highlights where actions may need to be taken regarding existing IAT runs or where an IAT has not been initiated. The Portlet can be added as a Configurable BI Portlet. Guidance is available in the User Manual. Click [here to access](#).

The portlet displays the number of:

- IATs Initiated
- IATs Pending Approval
- IAT Requests Timed Out
- IATs where an employee has been hired within the last 14 days, but the PDS has not been applied with 7 days of hire
- Applications where an IAT has not been initiated

An example of the IAT Actions Portlet is shown below:



IAT Initiated	Pending Approval	Request Timed Out	PDS Not Applied	Applicants No IAT
48	0	0	1	31

## 13. FURTHER INFORMATION

Further information can be found by accessing the:

ESR User Manual. Click to [here](#) to access.

ESR-NHS0060 Workflow Notifications Guide. [Click here to access.](#)

## 14. APPENDIX 1. CONTENTS OF THE PORTABLE DATA SET

The tables below outline the Contents of the Portable Data Set

Key
For Information Only
Transferred
Not Transferred

### Note

Where organisations are using Auto IAT, notifications will go to the PDS Notification Role and IAT Initiator. IAT Initiators will need to be allocated to the IAT Initiator Role to ensure that they receive the workflow notifications related to non-Auto IAT requests.

Data Item	Pre-Employment	Post Hire	Notification sent to Role
Personal data			
Last Name	For Information only (Stat and Mand Ntf & IAT Ntf)	Transferred	Stat and Mand Ntf Role (pre hire) & IAT Initiator (at hire)
First Name	For Information only (Stat and Mand Ntf & IAT Ntf)	Transferred	Stat and Mand Ntf Role (pre hire) & IAT Initiator (at hire)
Title	For Information only (Stat and Mand Ntf & IAT Ntf)	Transferred	Stat and Mand Ntf Role (pre hire) & IAT Initiator (at hire)
Middle	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Marital Status	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Nationality	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Known As	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Previous Last Name	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Maiden Name	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Date of Birth	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
National Insurance Number	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Gender	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
NHS Identifier	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Recruitment Source	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
NHS Organisation	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Unique NHS Identifier (not visible in ESR)	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Email Address	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Loss of Office Payment Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Loss of Office Reckonable Service Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
NHS Pensioner	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Bank Account Details	Displayed to Applicant Only	Transferred where confirmed by the applicant	PDS Notification/IAT Initiator will be informed if details confirmed
Primary Address data			
Address Style	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Address Type	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Address Line 1	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Address Line 2	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Address Line 3	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Town	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
County	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Post Code	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Country	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Registrations and Memberships data			
Full Registrations and Memberships Details	For Information only (Only Prof Reg Number)	Transferred	PDS Notification/IAT Initiator
Sickness Absence			
Original Trust	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Transfer Trust	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Absence Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Absence End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Element Name	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Industrial Injury Flag	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Element_Start	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Element_End	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Valid	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Special Leave			
Absence Start	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Absence End	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Duration Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Duration Hours	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Training			
Title	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Duration	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Duration Units	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Status	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Supplier	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Source Indicator	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

e-Learning			
National Enrolments	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
National Active Learning Path Subscriptions	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Learning History Tab	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Competencies			
Competence	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Proficiency Level	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Date From	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Date To	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Source of Proficiency Rating	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator (at hire)
Certification Method	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator (at hire)
Certification Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator (at hire)
Certification Next Review	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator (at hire)
Date Last Awarded	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Awarded By	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Title	National Stat & Mand Competencies only Transferred	Transferred	Stat and Mand Ntf Role (pre hire) & PDS Notification/IAT Initiator (at hire)
Qualifications			
Type	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Title	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Status	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator



Grade	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Award Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Subject Details: Subject	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Subject Details: Status	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Subject Details: Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Subject Details: End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Subject Details: Grade	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Employment History			
Prev Emp: Employer	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Prev Emp: Address	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Country	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Type	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Description	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / Years	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / Months	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Prev Emp: Previous Employer / DFF / Reason for Leaving	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / DFF / Regular User	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / DFF / Total of Regular user miles	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Employer / DFF / Total of Standard user miles	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Job (or Role)	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Employee Category	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / Years	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / Months	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Employment Category	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Grade	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Scale Point	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Salary	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Hours	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Occupation Code	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Position (Post Title)	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Incremental Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: WTE	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Prev Emp: Previous Job / DFF / Pension override end date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Prev Emp: Previous Job / DFF / Redundancy payment received	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assignment History			
Assg Hist: Employer	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Address	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Type	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Description	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Assignment Start Date (Earliest)	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Assignment End Date (Latest*)	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Employer / Years	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Employer / Months	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Employer / Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Assignment Start Date	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Assignment End Date	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Job (or Role)	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Employee Category	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Job / Years	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Job / Months	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Previous Job / Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Employment Category	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Assg Hist: Grade	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Scale Point	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Salary	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Hours	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Occupation Code	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Assg Hist: Position (Post Title)	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Incremental Date	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: WTE	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Assg Hist: Start Date In Grade	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Primary Flag	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Service Dates			
CSD 3 Months	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
CSD 12 Months	For Information only (on IAT Notification)	Transferred	PDS Notification/IAT Initiator
Aggregate Service Years	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Aggregate Service Days	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Date of Entry to NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Previous Trust Pension End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pensions Override Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification
Service History			
Employer (VPD number and name)	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History

Date From	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Date To	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Assignment From	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Assignment To	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Assignment Number	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Job Title	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Grade	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Point	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Salary	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
WTE	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Primary	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Incremental Date	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
CSD 1 Week	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
CSD 3 Months	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
CSD 12 Months	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Reason for Leaving (only where Redundancy, Employee Transfer or Retirement is the reason, otherwise this field will be left empty)	For Information only (on IAT NHS Service History)	Not Transferred	PDS Notification/IAT Initiator/IAT Service History
Payroll Information (elements)			
Pension Add Yrs Full 1 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension Add Yrs Full 2 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator

Pension Add Yrs Full 3 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension Add Yrs Half 1 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension Add Yrs Half 2 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension Lump Sum 1 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension Lump Sum2 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Add Pension Purchase 1 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Add Pension Purchase 2 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Add Pension Purchase 3 NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Distinction Award NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Clinical Ex Award NHS	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension SD Number	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Pension NHS – Override Pension End Date	Not on Notification/Not Transferred	Transferred to Pension NHS – Override Pension Start Date + 1 day	PDS Notification/IAT Initiator
Cash Floor Protection NHS	For Information only (Jr Doc & Trn Dentist Contract Ntf)	Transferred	Jr Doc & Trn Dentist Contract
Annual Leave Appointment NHS	For Information only (Jr Doc & Trn Dentist Contract Ntf)	Transferred	Jr Doc & Trn Dentist Contract
Immunisations			
Body Fluid and Innoculation Incidents	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
COVID-19	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
COVID-19 Vaccinations	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Diphtheria Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator

HIV details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Hepatitis A Injections	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Hepatitis B Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Hepatitis B Injections	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Hepatitis C Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Influenza Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Latex Sensitivity	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
MMR Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Polio Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Rubella Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Tetanus Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Tuberculosis Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Typhoid Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
Varicella Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
OH Assessment Details	Transferred	Transferred if not done at pre hire stage	Occupational Health Administrator
DBS Information			
Type of DBS Disclosure	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
Date DBS/CoGS Received	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator

DBS Disclosure Issue Date	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
DBS Unique Number	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
DBS Check Outcome	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
Children's Barred List Check Requested	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
Adults Barred List Check Requested	For Information only (on IAT Notification)	Transferred for Doctors in Training where no existing DBS data	PDS Notification/IAT Initiator
Apprenticeship Details			
Apprenticeship Level	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Framework Standard	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Status	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Start Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Proposed End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Actual End Date	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Main Training Provider	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
EPA Centre	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Apprentice Type	Not on Notification/Not Transferred	Transferred	PDS Notification/IAT Initiator
Appraisals and Development Summary			
Review Type	Not on Notification/Not Transferred	Transferred for Review Type of Medical Appraisal where the position for the	PDS Notification/IAT Initiator



		primary assignment has a Medical and Dental Occupation Code	
Period Start Date	Not on Notification/Not Transferred	Transferred for Review Type of Medical Appraisal where the position for the primary assignment has a Medical and Dental Occupation Code	PDS Notification/IAT Initiator
Period End Date	Not on Notification/Not Transferred	Transferred for Review Type of Medical Appraisal where the position for the primary assignment has a Medical and Dental Occupation Code	PDS Notification/IAT Initiator
Review Date	Not on Notification/Not Transferred	Transferred for Review Type of Medical Appraisal where the position for the primary assignment has a Medical and Dental Occupation Code	PDS Notification/IAT Initiator
Next Review Date	Not on Notification/Not Transferred	Transferred for Review Type of Medical Appraisal where the position for the primary assignment has a Medical and Dental Occupation Code	PDS Notification/IAT Initiator