

Electronic Staff Record

Online Payslips Implementation Guide

→ Moving to Online Payslips/P60s

As we are now in a world where flexible/hybrid and remote working is commonplace, NHS organisations are seeing the benefits of switching off their paper payslip processes and empowering their staff to be able to access their online payslips immediately when made available, often before payday, at a time to suit them.

Moving away from paper payslips benefits not only the employee, but also the organisation and the environment, making it a **'Cleaner, Greener & Safer'** solution for the NHS.

This guide is designed to be a one-stop-shop for all aspects of implementing online payslips for the whole organisation, providing a full end to end guide, highlighting key steps and considerations, signposting useful resources and outlining what support is available from the ESR NHS Central Team to assist the organisation during and post implementation.

Pre Implementation Communication

One of the key pre requisites to a successful project is good communication within the organisation in advance of any change. When switching to online payslips it is recommended that you give your employees at least three months notice of the change. A robust communications strategy and plan should be in place to make sure your employees are aware of the planned change, highlighting the access requirement for ESR, and raising awareness as to the retrieval of usernames/passwords if needed. Some of the most successful organisations that have switched to online payslips communicated on a regular basis on the run up to go live, giving employees the chance to raise any access issues well in advance of go-live, making the final transition from paper to online payslips as smooth as possible.



For information on the benefits of switching to Online Payslips please see the [Online Payslip Brochure](#).

→ Implementation process

1

**Employee
Self
Service**

Ensure staff have access to their ESS record over the Internet.

2

**Trust
Level
Opt out**

Opt out of receiving paper payslips at Trust level.

3

Exceptions

Review any exceptions and opt in at individual level or via mass update.

4

**Offset
Date**

Set the number of days before payday when payslips are viewable.

5

**Online
Payslip
Generation**

Run the Payroll and ensure the generation of online payslips is included.

6

Leavers

Remind employees to download their payslips before leaving.

Pros and Cons

Pros

- Faster access to pay results to enable the employee to check what they have been paid.
- Viewable anytime and anywhere – from a desktop, tablet, mobile phone at home or at work.
- Access to historical payslips/P60s.
- Leaver payslips and P45s can be emailed locally.
- Personal data is protected from risks of paper being lost in transit.
- Instant access for proof of income for 3rd party agencies e.g. home office, mortgage/rental applications etc.
- Payslip messages – no limit to number of message lines that can show in the online payslip, restricted to 10 lines on paper payslip.
- Reduction in back-office cost reduction for time spent sorting/distributing/postal costs etc.
- Reduction in Information Governance breaches due to missing payslips
- Can prevent under/overpayments by having early sight of payslip prior to pay day.
- Reduction in carbon footprint.

Cons

- Initial set up and rollout can be resourceful
- Perceived barriers by employee – no access to a computer etc.



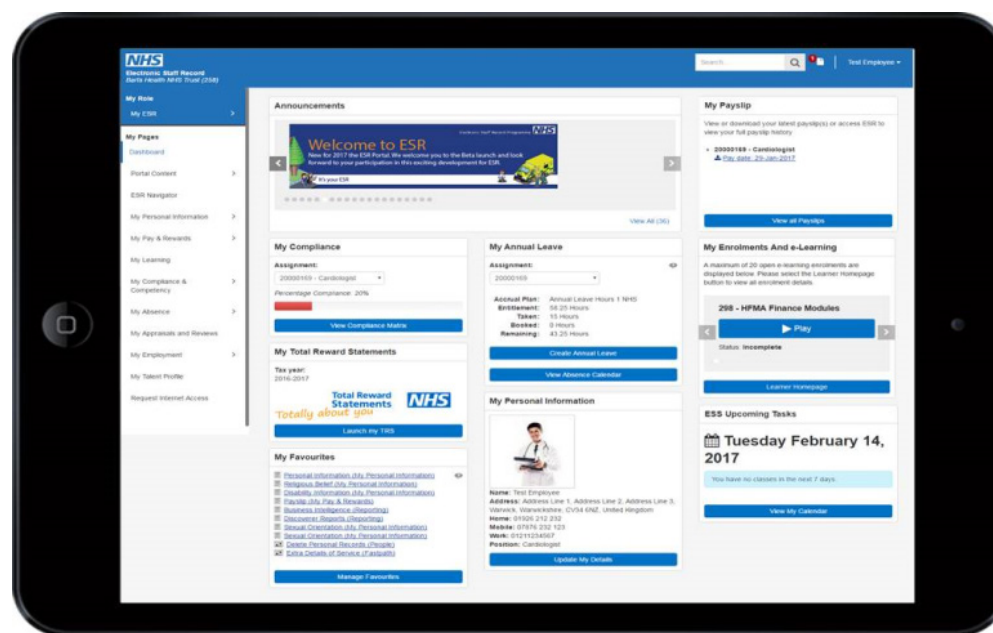
1 Employee Self Service over the Internet

In order for employees to be able to view their online payslip, they will need access to My ESR via Employee Self Service or Employee Self Service Limited Access.

If your organisation is already using Employee Self Service (ESS) or Employee Self Service Limited Access (ESSLA), then you first need to identify anyone who has not been given the ESS or ESSLA User Responsibility Profile (URP). You can do this by running the Business Intelligence (BI) User Administration Dashboard – Detail report to identify those staff with ESS or ESSLA URPs.

This will indicate which staff have the URP, you will therefore need to cross reference this with the Staff in Post BI report to identify those who are missing the URP.

Providing employees with the ability to view their online payslip at anytime, anywhere from any device is one of the main advantages of online payslips. In order to provide your employees with internet access without further intervention from them to set it up, a Trust Level setting is available to enable automatic internet access. This removes the need for users to log into ESR on your organisations network (HSCN/N3 connection) and selecting 'Manage Internet Access' before being able to use ESR over the internet. In addition a further setting for Auto User Creation provides new User Accounts to be created automatically, which enables usernames and passwords to be generated for new hires and applicants. The Automatic Internet Access setting works in conjunction with the Auto User Account creation process so will not take into consideration user accounts created manually.



2 Trust Level Opt Out

Opt out of receiving paper payslips: If Trusts wish to opt out of receiving paper payslips, they are able to do this at overall organisation Trust level, or by individual at Employee level. Please note it is not possible to opt in/opt out individual organisations within the Trust itself.

Trust Level Opt Out

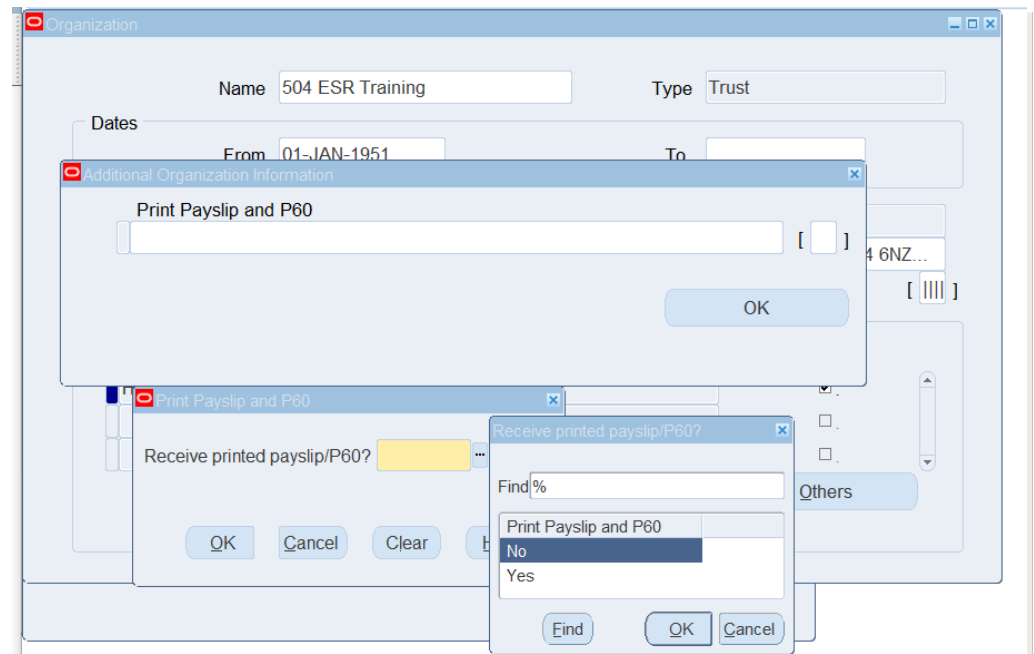
An Extra Information Type (EIT) is available at Trust level to enable an Organisation to state that they do not wish to have paper payslips or P60's. The default position is for all Trusts to be opted into printing. To change this at a Trust level then this can be done as follows:

XXX Local Workstructures Administration
Navigation Path: Organisation > Description

Query back the 'Trust' level Organisation > Others > Printed Payslip and P60.

The default setting for the field is 'Yes' which will produce printed Payslips and P60's for the Organisation without any further entry in this field. An Organisation can opt to override this by changing the value to 'No' to suppress the printing of Payslips and P60's.

Please note that once an organisation switches off printing of payslips and P60s at Trust level, individuals themselves cannot opt back in via Self Service. If any individuals require an ongoing paper payslip for essential reasons, a professional user would need to opt them back in via core forms. Instructions on how this can be done at an individual level follow.



3 Exceptions

Person Level Opt In / Out

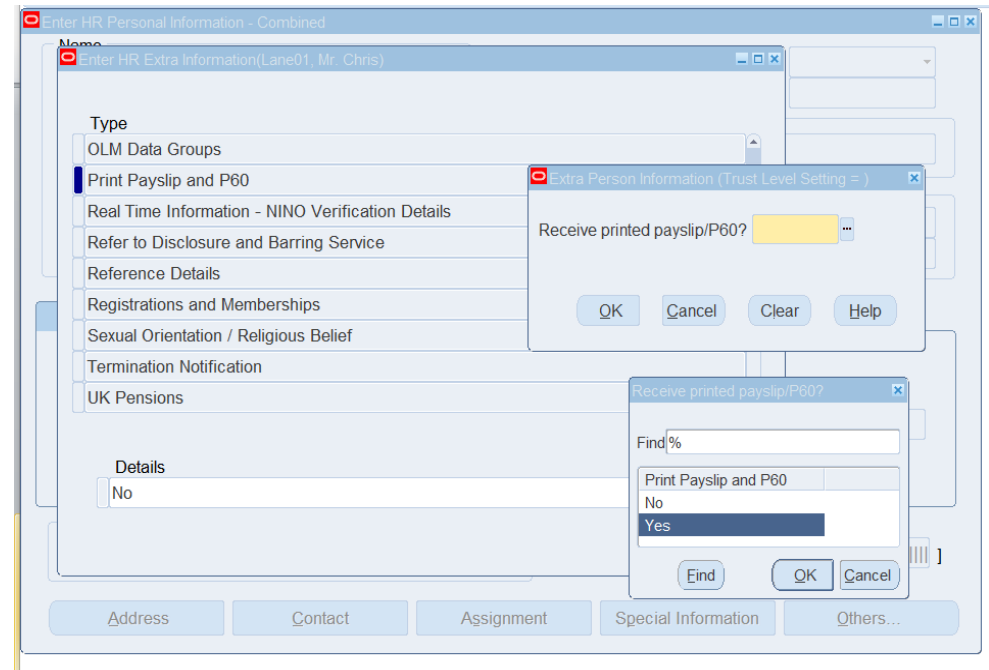
It is possible to state at person level whether an individual should receive paper payslips. This only needs to be set to override the Trust level setting. Where the Trust setting is 'Yes' for printing, then all Payslips and P60's will be printed except those explicitly set to 'No' at Person level. Where the Trust setting is 'No' to suppress printing then no Payslips or P60's will be printed except those explicitly set to 'Yes' at person level.

The Person EIT is available to the following responsibilities:

- XXX Payroll Administration
- XXX Payroll Audit
- XXX Payroll Data Entry
- XXX Payroll Super Administration
- Navigation Path: Fastpath > Printed Payslip and P60

- XXX HR Administration
- XXX HR Data Entry
- Navigation Path: People > Enter and Maintain > Others > Extra Information > Print Payslip and P60

To amend the setting at Person Level navigate as above. If you have opted out of printed payslips at Trust level and wish to opt an individual back into receiving paper payslips, amend this field to Yes.



3 Exceptions

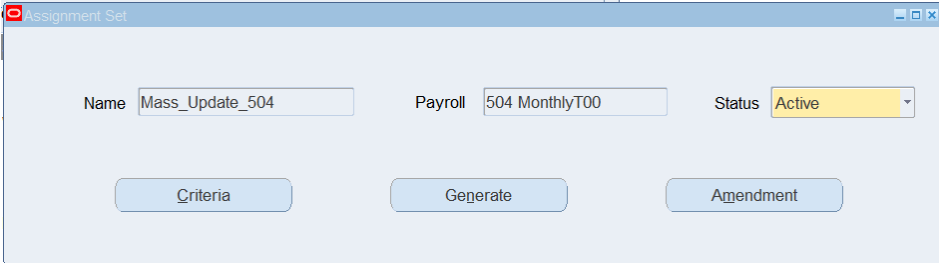
How to opt in several individuals via a mass update

If you have a requirement to opt multiple individuals back into receiving paper payslips/P60s, the 'NHS Mass Update Print Payslip EIT' process is available for employees in a given assignment set. This section reviews first of all how to create an assignment set, and details the process which can be run to mass update the print payslip field against those individuals defined in the assignment set.

How to create an assignment set

It is possible to process subsets of the employees assigned to a payroll and if there is a need to process smaller groups within a single payroll, an assignment set will provide the mechanism. The ability to create an Assignment Set is currently available to users with XXX Payroll Super Administration only.

There are several ways to define an assignment set, for more information on the different options available please refer to the User Manual document – [Assignment Sets](#). Please also refer to the User Manual to [Create Assignment Sets using Web ADI](#). For the purpose of opting several individuals back into receiving paper payslips/P60s after switching off paper payslips at Trust level, the 'Include Assignments' option will be detailed here.

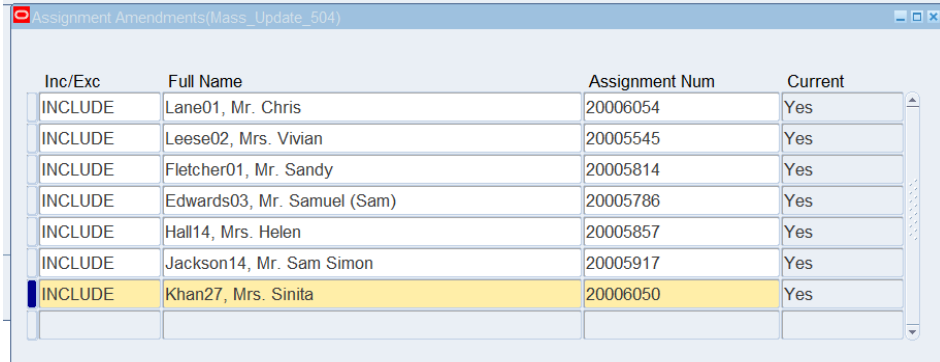


Assignment Set

Name: Mass_Update_504 Payroll: 504 MonthlyT00 Status: Active

Criteria Generate Amendment

1. Enter a Name. It cannot start with a number but should include the Employing Authority ID.
2. Enter a Payroll if it is desired to restrict the assignments to be included to those with that payroll associated. It is normal to include a Payroll since most payroll processes will be run by payroll but there may be some processes which are run across payrolls and if an assignment set is used that assignment set should be defined without a payroll.
3. Save the Assignment Set header.
4. Click on the Amendment button.



Inc/Exc	Full Name	Assignment Num	Current
INCLUDE	Lane01, Mr. Chris	20006054	Yes
INCLUDE	Leese02, Mrs. Vivian	20005545	Yes
INCLUDE	Fletcher01, Mr. Sandy	20005814	Yes
INCLUDE	Edwards03, Mr. Samuel (Sam)	20005786	Yes
INCLUDE	Hall14, Mrs. Helen	20005857	Yes
INCLUDE	Jackson14, Mr. Sam Simon	20005917	Yes
INCLUDE	Khan27, Mrs. Sinita	20006050	Yes

3 Exceptions

5. Enter Include in Inc/Exc or select from the List of Values (LoV)
6. Select an employee using Full Name or Assignment Num. Both fields have LoV's available which will be restricted by the Payroll entered on the header.
7. Repeat for each assignment to be included in the Assignment Set.
8. Save the Assignment Set.

Run 'NHS Mass Update Print Payslip EIT' process to mass update print payslip information against specified individuals

Once the assignment set has been created detailing those individuals who should be opted back into receiving a paper payslip, the 'NHS Mass Update Print Payslip EIT' process can be run with the assignment set attached.

This process is available to the following responsibilities:

- XXX Payroll Super Administration
- XXX Payroll Administration
- XXX HR Administration
- XXX HR Administration (with RA)

Navigation Path: Requests > Submit Request > Single Request

The screenshot shows the 'Submit Request' dialog box. The main dialog has a 'Run this Request' section with a 'Copy' button. Below this are fields for 'Name' (containing 'NHS Mass Update of Print Payslip EIT'), 'Operating Unit', 'Parameters', and 'Language'. A 'Parameters' sub-dialog is open, showing 'Assignment Set' (containing 'Mass_Update_504') and 'Opt-In for Print Payslip' (containing 'Yes'). The sub-dialog has 'OK', 'Cancel', 'Clear', and 'Help' buttons. Below the sub-dialog is the 'At these Times' section with a 'Run the Job' button. The 'Upon Completion' section has checkboxes for 'Save all Output Files' (checked) and 'Burst Output' (unchecked). Below this are fields for 'Layout', 'Notify', and 'Print to' (containing 'noprint'). At the bottom of the main dialog are 'Help (C)', 'Submit', and 'Cancel' buttons.

3 Exceptions

1. Click in the Name field and select NHS Mass Update of Print Payslip EIT from the LoV. The parameters window will open automatically.
2. Click in the Assignment Set field and select the Assignment Set from the LoV .
3. Click in the Opt-In for Print Payslip field and select the required value from the LoV . To opt those individuals in the assignment set defined back into receiving paper payslips if your organisation has opted out at Trust level, select Yes.
4. Click the OK button. The parameters screen will close and the Submit Request form will be displayed.
5. Click the Submit button to run the process.
6. Once the Phase = Completed and the Status = Normal, click the View Log button to view the results.

The process will populate the 'Receive printed payslip/P60' field for the following:

- All Active Employees in an Organisation
 - Using an Assignment Set with no Payroll and no amendments defined
- All Active Employees in an Organisation excluding certain Employees
 - Using an Assignment Set with no payroll and excluding the selected Assignments in Amendment screen
- All Active Employees in a selected Payroll
 - Using an Assignment Set with a Payroll defined and no amendments defined
- All Active Employees in a selected Payroll excluding certain Employees
 - Using an Assignment Set with a Payroll defined and excluding the selected Assignments in the Amendment screen
- Selected Employees in a Single Organisation
 - Using an Assignment Set with no Payroll defined and including the selected Employees from the Organisation
- Selected Employees on a Payroll
 - Using an Assignment Set with Payroll defined and including the selected Employees from the Payroll.

```
+-----+
Custom HR: Version : 12.2

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XX_MASS_UPDATE_PAYSLIP_EIT: NHS Mass Update of Print Payslip EIT
+-----+

Current system time is 10-JUL-2020 14:27:24

+-----+

[10-JUL-2020 14:27:24]: **Starts**
[10-JUL-2020 14:27:24]: **Ends**
+-----+

Start of log messages from FND_FILE
+-----+

Program Parameters
-----
Assignment Set      : Mass_Update_504
Opt-In for Print Payslip : N

No.      Employee Number      Status      Error Description
-----
1         20005545      Success
2         20005786      Success
3         20005814      Success
4         20005857      Success
5         20005917      Success
6         20006050      Success
7         20006054      Success

Total Record Count      : 7
Success Count           : 7
Error Count              : 0

+-----+
End of log messages from FND_FILE
+-----+
```

4 Offset date

Making online payslips available early

To change when online payslips are made available for employees to view, the Payslip offset date can be set in the Payroll Description window.

This can be both beneficial for the employees themselves to have the ability to view their payslip days before their payday, as well as the Payroll Team, as employees are able to raise queries on the run up to payday, as opposed to any queries being received on payday or after.

XXX Payroll Super Administration

Navigation Path: Payroll > Payroll Description > Payslip

The Payslip View date is used to default the Payslip View date against each Payroll Period. The offset value entered for the Payroll is relative to the Normal Payment Date. For example, an offset value of zero allows the Online payslips to be viewed on the Normal Payment Date. To allow the payslips to be viewable 4 days before the Normal Payment Date, then -4 would be entered in the field:

The screenshot shows the 'Payroll' window with the following details:

- Name: 515 MonthlyT00
- Period Type: Calendar Month
- First Period End Date: 30-APR-2023
- Number of Years: 20
- Date Offset section:
 - Normal Payment: -6
 - BACS Processing: -7
 - Pay Advice: 0
 - Cut Off: -9
 - Payslip: -4
- Default section:
 - Payment Method: 515 Cheque
 - Consolidation Set: 515 TrainMonthly
- Costing section:
 - Costing: [N|]
 - Suspense Account: [N|]
- Effective Dates:
 - From: 20-NOV-2023
 - To: []
- Options:
 - Agrees Payroll
 - Negative Payment Allowed [No]
- Buttons: Statutory Information (065/VZ20585.1.E), Period Dates, Valid Payment Methods

The Default Dates zone in the Payroll Calendar will be populated with dates derived using the Date Offsets on the Payroll window. The dates can be overridden against each Pay Period if required.

The screenshot shows the 'Period Dates(504 MonthlyT00)' window with a table of payroll periods and a 'Default Dates' popup window.

Period	Start Date	End Date	Status
1 2023 Calendar Month	01-APR-2023	30-APR-2023	Open
2 2023 Calendar Month	01-MAY-2023	31-MAY-2023	Open
3 2023 Calendar Month	01-JUN-2023	30-JUN-2023	Open
4 2023 Calendar Month	01-JUL-2023	31-JUL-2023	Open
5 2023 Calendar Month	01-AUG-2023	31-AUG-2023	Open

Default Dates	
Payslip View	Further Period Det.
20-APR-2023	
21-MAY-2023	
20-JUN-2023	
21-JUL-2023	
21-AUG-2023	

5

Online payslip generation

How to generate an online payslip

A number of Payroll processes need to be completed before the generation of the online payslips. See related document – [Detailed End to End Payroll Processes](#).

Following completion of the relevant processes the following requests will generate the online payslip for viewing by Payroll and Self Service users:

NHS Generate Payslip Data Archive (Freq)
NHS Complete Payslip Archive (Freq)

NHS Generate Payslip Data Archive

The NHS Generate Payslip Data Archive process gathers and stores payslip data for all Employees processed in a Payroll run or QuickPay.

When the Copy Pay Advice is initiated from the Payroll run or run independently, the NHS Generate Payslip Data Archive process will also be automatically submitted if it hasn't already been run.

The process is also available to run independently as a single request.

The process output can be viewed using the Payroll Run Results or Assignment Process Results screen.

This is available to the following responsibility:

XXX Payroll Super Administration
Navigation Path: Folders > Payroll Process Results

1. Click in the Payroll field and select the required Payroll from the LoV
2. Click in the From field and enter the required period, e.g. 3 2023
3. Click in the To field and enter the required period e.g. 3 2023
4. Click in the Action Type field and select the required action from the List of Values
5. Click the Find button to retrieve the results.

The screenshot shows a window titled "Payroll Processes" with a search interface and a table of results. The search fields are: Payroll (508 Monthly), From (3 2023 Calendar M), To (3 2023 Calendar M), and Action Type. A "Find" button is visible. The table below has columns: Retry, Date, Period, Type, Name, Payroll, and Status. Two rows are visible, both with a status of "Complete".

Retry	Date	Period	Type	Name	Payroll	Status
<input type="checkbox"/>	24-JUN-2023	3 2023 Calenda	Magnetic report	NHS Generate UK Pays	508 Monthly	Complete
<input type="checkbox"/>	24-JUN-2023	3 2023 Calenda	Run	1--	508 Monthly	Complete

At the bottom of the window, there are buttons for: Assignment Process, Message, Process Info., Conc. Manager, Breakdown, and Output.

5

Online payslip generation

The NHS Generate Payslip Data Archive process will be displayed as follows:

Type = Magnetic Report

Name = NHS Generate UK Payslip Archiver

- Click in the row containing the correct process and click the Assignment Process button. The Assignment Processes form will be displayed showing all Assignments processed as part of the NHS Generate Payslip Data Archive process.

The screenshot shows the 'Assignment Processes' window with the following data:

Date	Period	Type	Name	Payroll	Status
24-JUN-2023	3 2023 Calenda	Magnetic report	NHS Generate UK Pays	508 Monthly	Complete

Retry	Employee	Assignment	Number	Status
<input type="checkbox"/>	Smith, Mr. Ben	20028366	1190085	Complete
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Buttons: View Results, Message, View Output

- Highlight an Employee record and click the View Results button. The View Archive Values form will be displayed.

The screenshot shows the 'View Archive Values' window for 'Smith, Mr. Ben' with the following details:

Archive Information:

- Name: Smith, Mr. Ben
- Assignment No.: 20028366
- Date: 24-JUN-2023
- Report: NHS_UKPS_ARCH
- Locked:

Line Level Archiver:

Action Information Category	Details
NHS_PAYSLIP_BALANCE_DETAILS	NHS_PAYSLIP_BALANCE_DETAILS.2916\83.2645\57.5
NHS_PAYSLIP_DEDUCTION_DETAILS	NHS_PAYSLIP_DEDUCTION_DETAILS.PAYE.309\4.-2
NHS_PAYSLIP_DEDUCTION_DETAILS	NHS_PAYSLIP_DEDUCTION_DETAILS.NI A.124\09.-1
NHS_PAYSLIP_DEDUCTION_DETAILS	NHS_PAYSLIP_DEDUCTION_DETAILS.NHS Pension 9\3
NHS_PAYSLIP_EMP_AND_STAT_DET	NHS_PAYSLIP_EMP_AND_STAT_DET.20028366.MR. BI
NHS_PAYSLIP_NAME_AND_ADD_DET	NHS_PAYSLIP_NAME_AND_ADD_DET.ESR Teaching
NHS_PAYSLIP_PAYMENT_DETAILS	NHS_PAYSLIP_PAYMENT_DETAILS.Basic Pay.169\46.1

Context:

Name	Value
Source ID	60882

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Online payslip generation

- Click in a row within the Details column to view the associated payslip data gathered for the Employee:

The screenshot shows a window titled 'Action Information DF' with a list of fields and values. The 'Context Value' is 'NHS PAYSIP BALANCE DETAILS'. The fields and their values are:

Context Value	NHS PAYSIP BALANCE DETAILS
Gross Pay Year To Date	2916.83
Taxable Pay Year To Date	2645.57
Tax Paid Year To Date	529
NI Letter	A
NI Pay Year To Date	2916.83
NI Conts Year To Date	188.74
Other NI Pay Year To Date	
Other NI Conts Year To Date	
Pensionable Pay Year To Date	2916.83
Pension Conts Year To Date	271.26
SD Ref Number	
Pensionable Pay Period To Date	1706.07
Taxable Pay Period To Date	1547.41
Previous Taxable Pay	0
Previous Tax paid	0

Buttons at the bottom: OK, Cancel, Clear, Help.

NOTE: The NHS Generate Payslip Data Archive (Freq) process is based on the result of a processed Payroll. In order to enforce data integrity an interlock rule has been applied to prevent the retry or rollback of a payroll process without the initial rollback of the associated NHS Generate Payslip Archive (Freq) process. The NHS Rollback Payroll Run (Freq) process has been updated to automatically check for archive processes and, where they exist, roll these back first. Users also have the option to roll back the NHS Generate Payslip Archive (Freq) process manually before the relevant Payroll is rolled back.

NHS Complete Payslip Archive

The NHS Complete Payslip Archive process can be run manually at any time following the completion of the NHS Prepayments process and forms a part of the mandatory steps for online payslip viewing. This process is essential to run as it ensures that any payslip messages are made available for the employee to view. There is no limit to the number of messages/lines that can be generated for payslip messages in the online payslip (paper payslips are restricted to 10 lines).

NOTE: The NHS Complete Payslip Data Archive (Freq) is based on the results of a processed prepayment. This is only required to be run at the end of the Payroll cycle. The Complete Archive process will create an interlock rule to prevent the retry or rollback of a prepayment process without the initial rollback of the associated NHS Complete Payslip Archive (Freq) process. For this reason, it should not be run until BACS has been processed and no future changes are likely.

The following instructions detail how to run the process as a single request.

XXX Payroll Super Administration responsibility
Navigation Path: Requests > Submit Request > Single Request

- Click in the Name field and enter NHS Complete Payslip Archive (Monthly) or select the process from the LoV
- Press TAB on the keyboard or click in the Parameters field.

5

Online payslip generation

Submit Request

Run this Request...

Copy...

Name: NHS Complete Payslip Data Archive (Monthly)

Operating Unit:

Parameters

Parameters

Payroll: 508 Monthly

Pay Period: 3 2023 Calendar Month

Payroll Run: 24 JUN. 2023 (1514004) 3 2023 Calendar M

OK Cancel Clear Help

Layout: Options...

Notify:

Print to: noprint

Help (G) Submit Cancel

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
1514040	Payroll Worker Process	1514037	Completed	Normal	SLAVE, 57892, , X, 1
1514039	Payroll Worker Process	1514037	Completed	Normal	SLAVE, 57892, , X, 1
1514038	Payroll Worker Process	1514037	Completed	Normal	SLAVE, 57892, , X, 1
1514037	NHS Complete Payslip Dat		Completed	Normal	ARCHIVE, NHS_UKPS_COMF
1514036	NHS Complete Payslip Dat		Completed	Normal	XXH, XXCOMPPSARCH, 508, .
1514035	Payroll Worker Process	1514031	Completed	Normal	SLAVE, 57890, , X, 1
1514034	Payroll Worker Process	1514031	Completed	Normal	SLAVE, 57890, , X, 1
1514033	Payroll Worker Process	1514031	Completed	Normal	SLAVE, 57890, , X, 1
1514032	Payroll Worker Process	1514031	Completed	Normal	SLAVE, 57890, , X, 1
1514031	NHS Generate Payslip Dat		Completed	Normal	ARCHIVE, NHS_UKPS_ARCH

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

- Click in the Payroll field and select the required Payroll from the List of Values.
- Click in the Period field and select the period to be processed from the List of Values.
The period will default based on the system effective date but can be amended if required.
- Click in the Payroll Run field and select the required run from the List of Values. The List of Values will display all processed runs in the selected period for the Payroll defined.
- Click the OK button. The Submit Request form will be displayed.

5

Online payslip generation

Once the processes have completed successfully the payslip can be viewed using the following responsibilities:

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

How to generate online P60

This can be done from the following responsibilities:

- XXX Payroll Super Administration
- XXX Payroll Administration

Navigation Path: Requests > Submit Request > Single Request

NHS RTI P60 Archive Process

In order to generate the archive data that is used to produce the P60 forms you must submit the 'NHS RTI P60 Archive Process'. The request has the following parameters:

The screenshot shows a 'Submit Request' dialog box with a 'Parameters' sub-dialog. The 'Parameters' dialog has the following fields: 'End Date' (05-APR-2023), 'Employers PAYE Reference' (999/29999), and 'Assignment Set'. The 'Submit Request' dialog has the following fields: 'Name' (NHS RTI P60 Archive Process), 'Operating Unit', 'Parameters', and 'Language' (American English). There are 'OK', 'Cancel', 'Clear', and 'Help' buttons at the bottom of the 'Parameters' dialog, and 'Help (G)', 'Submit', and 'Cancel' buttons at the bottom of the 'Submit Request' dialog.

End Date – this is a required field and should be the Tax Year End Date i.e. 05-Apr-20XX

Employers PAYE Reference – this is a required field. Select the PAYE Reference for the Employing Authority from the LoV.

Assignment Set – Parameter not in use Please Note: This is an overnight process, and this will need to be taken into account when scheduling the task.

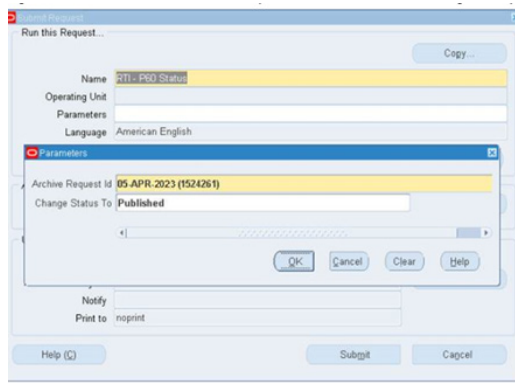
The NHS RTI P60 Reconciliation Report will be produced as part of the Archive Process. This report will list all the Assignments from the RTI P60 archive for which a P60 will be generated on-line/printed. Each Assignment will be displayed on a single line and show all of the data items which are included on the P60 form. Report totals will be printed at the end of the report. The output will be in Excel format.

5

Online payslip generation

RTI – P60 Status

To generate on-line P60's the RTI – P60 Status process should be submitted following the completion of the NHS RTI P60 Archive Process. The request has the following parameters:



Archive Request Id – this is a required field. Select the Request Id for the P60 Archive Process from the LoV.

Change Status To – Select 'Published' from the LoV

NOTE: the status must be set to 'Published' to generate the electronic P60s using the values calculated by the NHS RTI P60 Archive Process.

The On-line P60's are now ready to view.

Once the online payslips and P60s have been generated, as above, employees will be able to view their online payslips (in line with the offset date as per [Section 4](#)), and P60s.

How employees can view their payslip

Employees can view information about their Payslips using the Self Service system. They are able to view current and historical information by selecting the relevant Payslip/P60 from the dropdown menu provided.

This functionality is available from the following responsibilities:

XXX Employee Self Service

XXX Employee Self Service (Limited Access)

Navigation Path: ESR Portal > My ESR Dashboard > My Payslip and P60 Portlet > View My Payslips

OR

ESR App > My Payslip portlet



5

Online payslip generation

The most recent payslip will be displayed in the portlet. Newly generated payslips since the employee last logged in will be highlighted with a 'New Icon'. To the right of the latest payslip there is a plus (+) icon which when clicked enables the user to view and download up to the last three payslips per assignment where available. Where no previous Payslips are available, the message 'No Payslip available' will be displayed when the plus icon (+) is clicked.

Payslips will be displayed for up to 4 assignments (according to the most recent pay date).

Employees can download payslips from this portlet which, once downloaded, will be available in a PDF format.

The employee also has the ability to opt into receiving an FYI email to advise them that their latest online payslip is available, so they can then view it if they wish. The 'Email me when Payslip available – Yes/No' toggle button within the 'My Payslip and P60' portlet would need to be manually amended to 'Yes' by the employee themselves if they wish to receive this email. Emails will only be sent to users opted in at the time the central process is run for that period. For example, the central process is run on 15th of the month and the payslips are available on 25th of the month. Users opting in between 15th and 25th will not receive an email for that period.

1. To view the latest payslip, the Pay date link can be selected. To view older payslips, click the View My Payslips button in the My Payslips portlet which will take you directly to the Payslip page in ESR where full payslip history is available.

The screenshot displays the NHS Electronic Staff Record (ESR) interface. At the top, the NHS logo is visible. Below it, the title 'Electronic Staff Record' is shown with an illustration of three people. A list of menu items is provided: 'View My ESR', 'View My Payslip', 'View My TRS', 'ESR Status', 'ESR News', 'ESR Help', and 'Contact Us'. A portlet titled 'My Payslip and P60' is shown in the foreground, displaying the following information: '200000237 - Staff Nurse Band 5', 'Pay date: 26-Jun-2023', and 'P60: 2019/002'. A toggle switch for 'Email me when Payslip available' is set to 'YES'. At the bottom of the portlet, there are two buttons: 'View My Payslips' and 'View My P60s'.

5

Online payslip generation

2. The Search window will open automatically..

The screenshot shows the NHS My Pay & Rewards search interface. The top navigation bar includes the NHS logo, 'My Pay & Rewards', and user information 'Logged In As 503SLANE'. The search form contains the following fields: Assignment Number (20000237), Position Name (78272[Staff Nurse Band 5(N6A)], Year (2023), and Payslip (25-NOV-2023 - Assignment 20000237 - Run 1). Below the form are 'View Payslip' and 'Clear All' buttons. A footer contains copyright information and a 'Switch to Mobile' link.

3. Click the dropdown arrow in the Assignment Number field and select the required Assignment from the list. This is only applicable if the Employee has multiple Assignments. The Primary Assignment number will default.
4. Click the dropdown arrow in the Year field and select as required. The Year field will default to the most current year for which there is a payslip to view but this can be amended as necessary.
5. Click the dropdown arrow in the Payslip field and select the payslip to view. The most current payslip available will default. In some cases, the payslip dropdown menu will be blank e.g. for Bank staff who have not worked. In this scenario contact the Payroll team for further guidance.

The screenshot shows the NHS My Pay & Rewards search interface. The top navigation bar includes the NHS logo, 'My Pay & Rewards', and user information 'Logged In As 503SLANE'. The search form contains the following fields: Assignment Number (20000237), Position Name (78272[Staff Nurse Band 5(N6A)], Year (blank), and Payslip (blank). Below the form are 'View Payslip' and 'Clear All' buttons. A footer contains copyright information and a 'Switch to Mobile' link.

6. Click the **View Payslip** button. The following window will be displayed:

The screenshot shows a file dialog box with the text 'Do you want to open or save ePayslip.pdf (11.9 KB) from esrtrain.mhapp.nhs.uk?'. The dialog has 'Open', 'Save', and 'Cancel' buttons, and a close button (X).

5

Online payslip generation

Please note: if the payslip is being downloaded to the computer and saved, ensure that the payslip is being saved to a secure area. If using a public or shared computer, the downloaded file must be removed to prevent unauthorised access to the payslip data.

- Click Open to continue. The payslip for the selected period will be displayed:

ASSIGNMENT NUMBER	EMPLOYEE NAME	LOCATION					
20000237	MISS SARAH LANE						
DEPARTMENT	JOB TITLE	PHYSICAL DESCRIPTION					
Ward 1	Staff Nurse Band 5	Review Body Band 5					
NHS		PT BALANCE					
25298.00		25298.00					
TAX OFFICE NAME	TAX OFFICE REF	TAX CODE					
Dummy Office Name	999/Z9999	NONCUM					
PAY AND ALLOWANCES (+ MINUS AMOUNT)		DEDUCTIONS (AS INDICATED BEFORE)					
DESCRIPTION	WAGE/EARNED	PAYDUE	RATE	AMOUNT	DESCRIPTION	AMOUNT	BALANCE OF
Basic Pay	162.95	162.95	12.9378	2108.17	PAYE	215.60	
					NIA	172.34	
					NHS Pension 9.3%	196.06	
Year To Date Balances (This Employment Only)				This Period Summary			
GROSS PAY	2108.17	TAXABLE PAY	1912.11	PENSIONABLE PAY	2108.17	TAXABLE PAY	1912.11
N LETTER	A	TAX PAID	215.60	TAX PERIOD	7	NON-TAXABLE PAY	0.00
N PAY	2108.17	OTHER N PAY		FREQUENCY	Monthly	TOTAL PAYMENTS	2108.17
N CONTS	172.34	OTHER N CONTS		PERIOD END DATE	30 NOV 2023	TOTAL DEDUCTIONS	584.00
PENSIONABLE PAY	2108.17	PREVIOUS TAXABLE PAY	0.00	PERIOD END DATE	30 NOV 2023	TOTAL DEDUCTIONS	584.00
		PREVIOUS TAX PAID	0.00	PAY DATE	25 NOV 2023	NET PAY	1524.17
		PENSION CONTS	196.06	PAY METHOD	BACS		
GO REF NUMBER		EMPLOYEE NO.	20000237				

How employees can view their P60

This functionality is available from the following responsibilities:



- XXX Employee Self Service
- XXX Employee Self Service (Limited Access)
- Navigation Path: ESR Portal > My ESR Dashboard > My Payslip and P60 Portlet > View My Payslips
- OR
- ESR App > My Payslip portlet

- To view the latest P60, the P60 link can be selected. To view older payslips, click the View My P60s button in the My Payslips portlet which will take you directly to the P60 page in ESR where P60 history is available.
- The Search window will open automatically. A P60 will be available for each tax year processed. The radio button can be selected to view the required tax year, then click the View Report button to download the PDF.

The screenshot shows the NHS My Pay & Rewards interface. At the top, there is a navigation bar with 'Home', 'Navigator', 'Favorites', and 'Settings'. The user is logged in as '503SLANE'. Below the navigation bar, the employee's name 'Lane, Miss Sarah' and employee number '20000237' are displayed. The organization is 'NHS Business Group'. A 'View Report' button is visible. The main content area shows a search for P60s with a 'Tax Year' dropdown set to '2023-1'. Three radio buttons are listed, all selected, for the tax year '2023-1' with assignment number '20000237' (RTI P60 Archiver). A yellow box highlights these radio buttons.

5

Online payslip generation

How core users can view an online payslip and balances

Professional users are able to view Employee payslips online once the online payslip has been generated as part of the payroll process, as detailed above.

Users will be able to view current and historical information by selecting the relevant Payslip from the dropdown menu provided.

The following URP's can be used to access this functionality:

XXX Payroll Super Administration

XXX Payroll Administration

XXX Payroll Audit

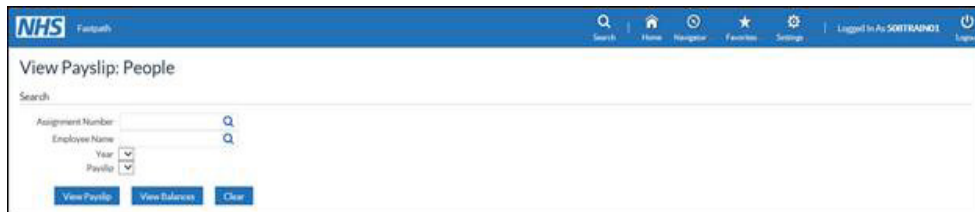
XXX Payroll Data Entry


XXX Finance Reporting

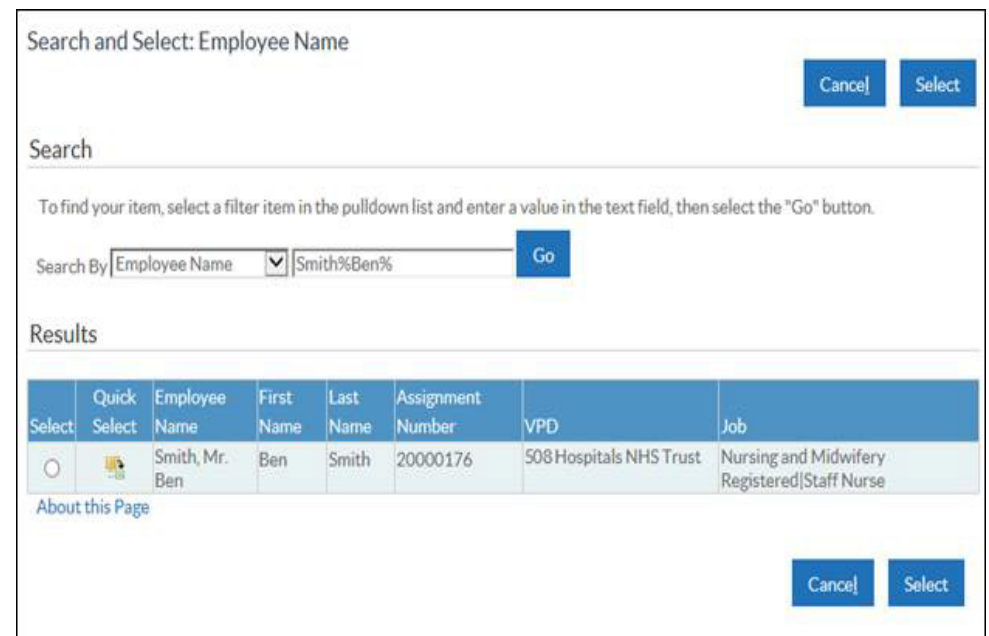
XXX HR Management


Navigation Path N > Fastpath > View Payslip

1. Click the View Payslip link within the Fastpath menu.



2. Click the  icon in the Employee Name field to search for the Employee.
3. Enter the Search appropriate criteria and click the Go button.

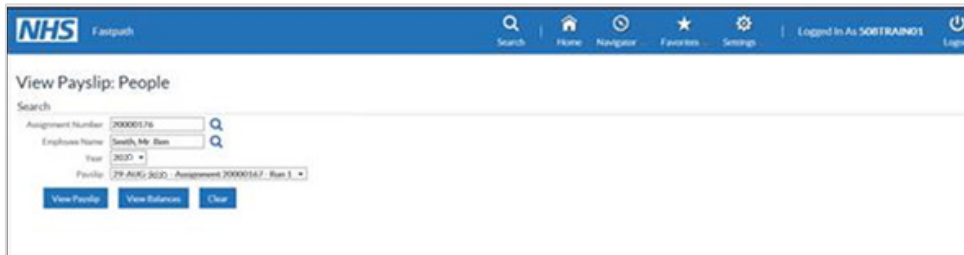


Select	Quick Select	Employee Name	First Name	Last Name	Assignment Number	VPD	Job
<input type="radio"/>		Smith, Mr. Ben	Ben	Smith	20000176	508 Hospitals NHS Trust	Nursing and Midwifery Registered Staff Nurse

5

Online payslip generation

- Click the **Quick Select**  icon to select the required Employee record. The **View Payslip: People** window will be displayed.



- Click the dropdown arrow in the **Year** field and select as required. The Year field will default to the most current year for which there is a payslip to view but this can be amended as necessary.
- Click the dropdown arrow in the **Payslip** field and select the payslip to view. The most current payslip available will default.
- Click the **View Payslip** button. The following window will be displayed:



- Click **Open** to continue. The payslip for the selected period will be displayed:

ASSIGNMENT NUMBER		EMPLOYEE NAME		LOCATION			
20057143		MR. BEN SMITH01		ESR Hospital			
DEPARTMENT		JOB TITLE		PAYSCALE DESCRIPTION			
Ward 5		Staff Nurse Band 5		Review Body Band 5			
SICR CODE		INC. DATE		STANDARD RATE			
19655.00				37.5			
TAX OFFICE NAME		TAX OFFICE REF		N NUMBER			
Training Tax Distric		123/K123		1100L CUMUL			
				WA507231A			
PAY AND ALLOWANCES (+ = MINUS AMOUNT)			DEDUCTIONS (R INDICATES REFUND)				
DESCRIPTION	WRD/EARNED	PAID/DUE	RATE	AMOUNT	DESCRIPTION	AMOUNT	BALANCE C/F
Basic Pay	162.95	162.95	10.0519	1637.92	PAYE	191.40	
Passenger Allow NP NT	30.04/16	12.00		0.00	NI A	156.87	
Night Duty EN	40.00	12.00	10.0519	120.62	NHS Pension 6.0%	114.69	
Saturday EN	7.50	2.25	10.0519	22.62	Pension Ams	4.98	
Unsocial EN	12.75	3.83	10.0519	38.45			
Rotating Shift A/ BP	162.95	162.95	0.5078	82.75			
Rotating Shift A/ EN	60.25	18.08	0.5078	9.18			
Rotating Shift Ams				82.75			
Year To Date Balances (This Employment Only)				This Period Summary			
GROSS PAY	3632.21	TAXABLE PAY	3414.28	PENSIONABLE PAY	1994.29	TAXABLE PAY	1874.64
NI LETTER	A	TAX PAID	316.80	TAX PERIOD	2	NON-TAXABLE PAY	0.62
NI PAY	3632.21	OTHER NI PAY		PREVIOUS TAXABLE PAY	0.00	FREQUENCY	Monthly
NI CONTRS	274.68	OTHER NI CONTRS		PREVIOUS TAX PAID	0.00	TOTAL PAYMENTS	1994.89
PENSIONABLE PAY	3632.21	PENSION CONTRS	217.83	PERIOD END DATE	31 MAY 2023	TOTAL DEDUCTIONS	488.72
SD REF NUMBER	11511111	EMPLOYEE NO.	20057143	PAY DATE	25 MAY 2023	NET PAY	1525.17
		PAY METHOD	Cheque				
MESSAGES FROM EMPLOYER							

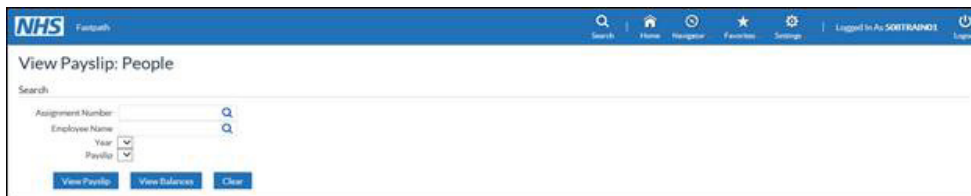
5


Online payslip generation

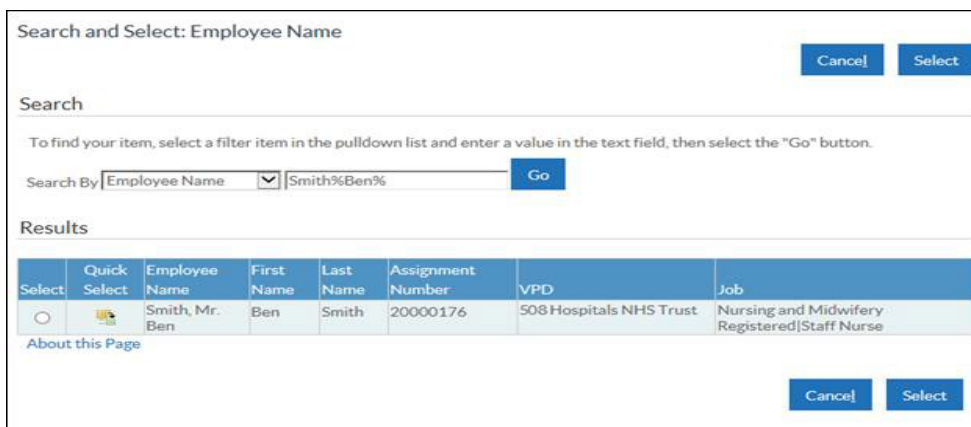
View Balances


Professional users are also able to view balances as below:

1. Click the View Payslip link within the Fastpath menu.

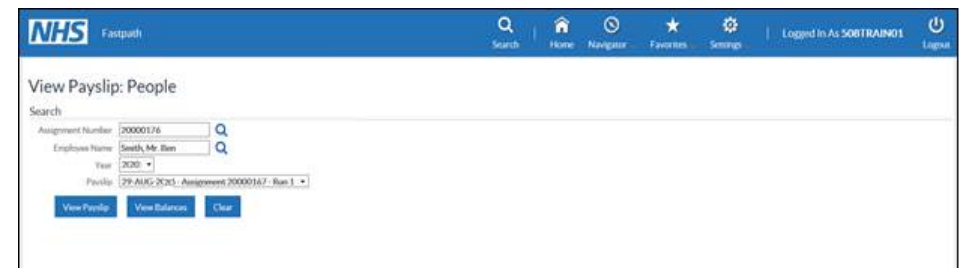


2. Click the  icon in the Employee Name field to search for the Employee.
3. Enter the Search appropriate criteria and click the Go button.



Select	Quick Select	Employee Name	First Name	Last Name	Assignment Number	VPD	Job
<input type="radio"/>		Smith, Mr. Ben	Ben	Smith	20000176	508 Hospitals NHS Trust	Nursing and Midwifery Registered Staff Nurse

4. Click the Quick Select icon to select the required Employee record. The View Payslip: People window will be displayed.



5. Click the dropdown arrow in the Year field and select as required. The Year field will default to the most current year for which there is a payslip to view but this can be amended, as necessary.
6. Click the dropdown arrow in the Payslip field and select the payslip to view. The most current payslip available will default.
7. Click the View Balances button. The balances region will be displayed showing the figures based on the payslip selected:

5

Online payslip generation

Balances	
	Effective Date: 29-Aug-2020
Employee Gross Rate of Pay	4166866.65
Employer Pensionable Pay	4166666.65
Employee Pension Contributions	387500.00
Employer Pension Contributions	583333.35
Arrears Pension Contributions	0.00
Arrears of Pension	0.00
Additional Pension 1 Contributions	0.00
Additional Pension 2 Contributions	0.00
Additional Pension 1 Instalments	0.00
Additional Pension 2 Instalments	0.00
ERRBO	0.00
Added Years Contributions	0.00
Arrears of Added Years	0.00
Arrears of Added Years Contribution	0.00
Arrears of Added Years Periods/ Arrears Pension Periods	0.00
Number of Hours/Sessions Worked	814.75
Number of Part Time Hours/ Sessions Worked	0.00
Number of Deemed Hours/Sessions	0.00
Number of Part Time Deemed Hours/Sessions	0.00
Non Pensionable Days	0.00
NI Earnings YTD	4166866.65
NI Earnings Pensions/Immune Tax Year	13404.00
NI Earnings Antisepulchral Tax Year	0.00
Employers NI Contributions YTD	574561.15
Student Loan	0.00

NOTE: you can change the Effective Date field and click the Go button to view the balances as at the chosen date. If the search criteria is amended the Balances region will close. Clicking the View Balances button again will display the Balances using the new criteria.

How core users can view online P60s

Professional users are able to view Employee pP60s online once they have been generated as part of the payroll process, as detailed above.

The following URP's can be used to access this functionality:

XXX Payroll Super Administration

XXX Payroll Administration

Navigation Path N > Fastpath > On-Line P60

The **On-Line P60: People** page will be displayed. The Advanced Search region should be used to search for the required Employee record.

The following fields are available to perform a search:

First Name

Last Name

Assignment Number

Job



5

Online payslip generation

1. Enter the required search criteria in the Advanced Search region and click the Go button.

The screenshot shows the 'On-Line P60: People' search page. The 'Advanced Search' section has the following fields: First Name (is), Last Name (is), Assignment Number (is), and Job (is). The 'Go' button is highlighted in blue. Below the search fields, there are buttons for 'Clear', 'Add Another', 'Assignment Category', and 'Add'. A table at the bottom shows a single entry for 'Smith, Mr. Ben' with an 'Action' icon highlighted in red.

All matching results will be displayed

The screenshot shows the search results for 'Smith, Mr. Ben'. The table below the search fields contains the following data:

Name	Assignment Number	Job	Organisation	Action	Details
Smith, Mr. Ben	20000003	Add Prof Scientific and TechniciPractitioner	508 Orthopaedic Theatres		

2. Check the **Select** radio button for the required Employee and click the **Action** icon

The screenshot shows the 'View Report' page for 'Smith, Mr. Ben'. The 'View Report' button is highlighted in red. Below the employee details, there are radio buttons for selecting a tax year and assignment number. The '2020-1 Assignment Number:20000003 (RTI P60 Archiver)' option is selected.

An entry will be available for each tax year processed.
NOTE: If the Employee has multiple Assignments but is not aggregated for PAYE a P60 will be available for each Assignment.
If the Employee has multiple Assignments and is aggregated for PAYE one P60 will be available which summarises all Assignments

3. Select the radio button for the required tax year and click the View Report button.
4. Click Open when prompted to view the P60. Alternatively, the file can be saved locally by clicking the Save As option.

5

Online payslip generation

Example output:

P60 End of Year Certificate
Tax year to 5 April 2020
This is a printed copy of an eP60

To the employee:
 Please keep this certificate in a safe place as you will need it if you have to fill in a tax return. You also need it to make a claim for tax credits or to renew your claim.

It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National Insurance contributions.

By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return.

HM Revenue and Customs
 The figures marked * should be used for your tax returns, if you get one

Employee's details
 Surname: SMITH
 Forenames or initials: BEN
 National Insurance number: AA000000
 Works/payroll Number: 20000003

Pay and Income Tax Details

	Pay		Tax deducted	
	£	p	£	p
In previous employment(s)	0	00	0	00
In this employment	1379	31	1374	00
Total for year	1379	31	1374	00

Final tax code: 1105L

National Insurance contributions in this employment

NIC code letter	Earnings at the Lower Earnings Limit (LEL) (where earnings are equal to or exceed the LEL)	Earnings above the LEL, up to and including the Primary Threshold (PT)	Earnings above the PT, up to and including the Upper Earnings Limit (UEL)	Employee's contributions due on all earnings above the PT
	£	£	£	£ p
A	3521	1393	9030	1161 85

Statutory payments included in the pay in this employment figure above

	£	p
Statutory Maternity Pay	0	00
Statutory Paternity Pay	0	00
Statutory Shared Parental Pay	0	00
Statutory Adoption Pay	0	00

Other details

Student Loan deductions in this employment (where £4 only):

Postgraduate Loan deductions in this employment (where £4 only): 44

Your employer's full name and address (including postcode):
 Hospitals NHS Trust

Employer PAYE reference: 111 1111

To employee:
 SMITH BEN

Certificate by Employer/Paying Office:
 This form shows your total pay for Income Tax purposes in this employment for the year.
 Any overtime, bonus, commission etc. Statutory Sick Pay, Statutory Maternity Pay, Statutory Paternity Pay, Statutory Shared Parental Pay or Statutory Adoption Pay is included.

P60 (Substitute) (Oracle UK) (2018-2019)
 © Copyright Oracle Corporation UK
 Do not destroy

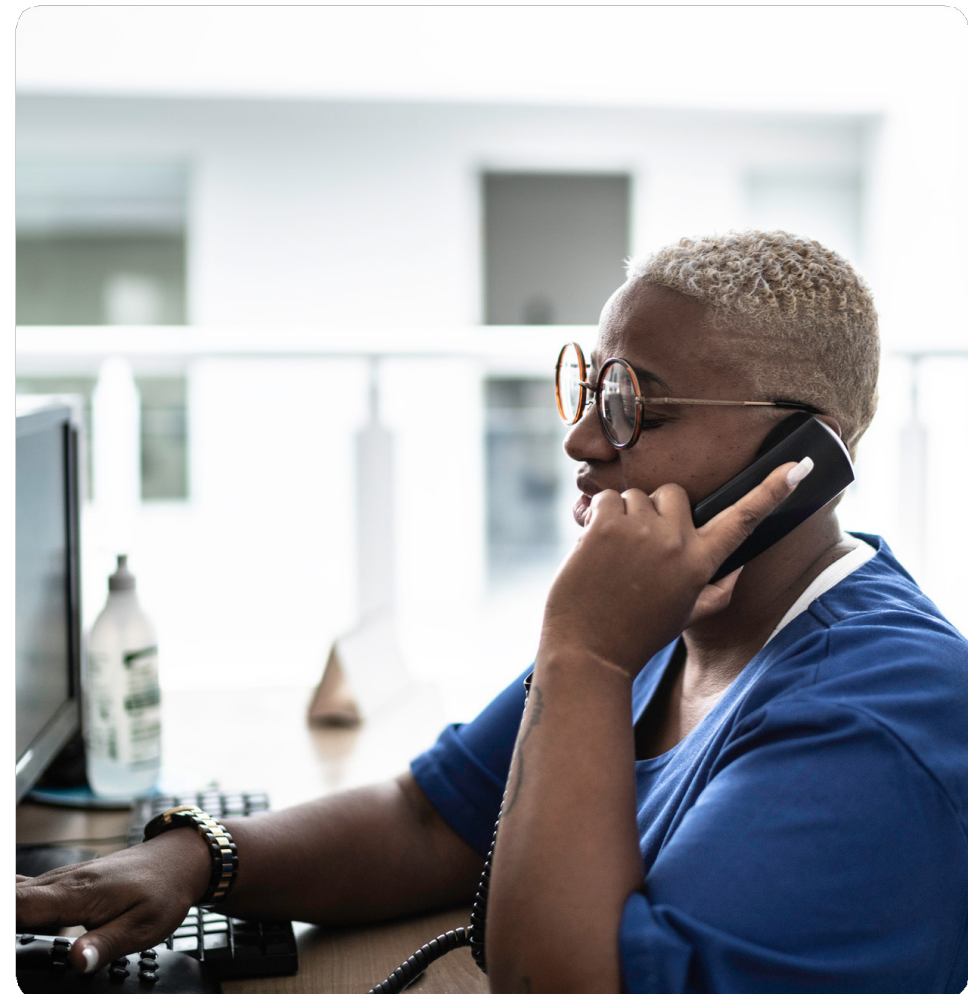
6

Leavers and Exceptions

Leavers

Employees will no longer have access to My ESR from their Actual Termination Date. If, for example, an individual paid on a monthly basis leaves on 10th July, their payslip would not be available at this date from within their My ESR Dashboard, therefore in order for them to have a copy of their final payslip, this can be sent to them in paper format by their organisation.

A paper payslip can be printed locally or emailed if required, this can be done by going into the Online payslips in professional forms - N > Fastpath > View Payslip. The same applies to the P45 as this can be printed locally in PDF format, or by emailing the P45 to the individual. Please refer to the User Manual document – [Produce a P45](#) for step-by-step information on how to print/download P45s locally. If the individual has been opted out of paper payslips, either at Trust or individual level, they will be automatically eligible to receive a printed payslip, without having to make manual amendments to their Print Payslip/P60 EIT. ESR will automatically recognise that they are a leaver based on their assignment status information and opt them back into receiving a paper payslip. However, for the automatically produced payslip to be delivered to the leavers home address it will be necessary to amend the People Group – Paypoint field to Default Home OR the Assignment Descriptive Flexfield – Payslip to Home field to Yes.



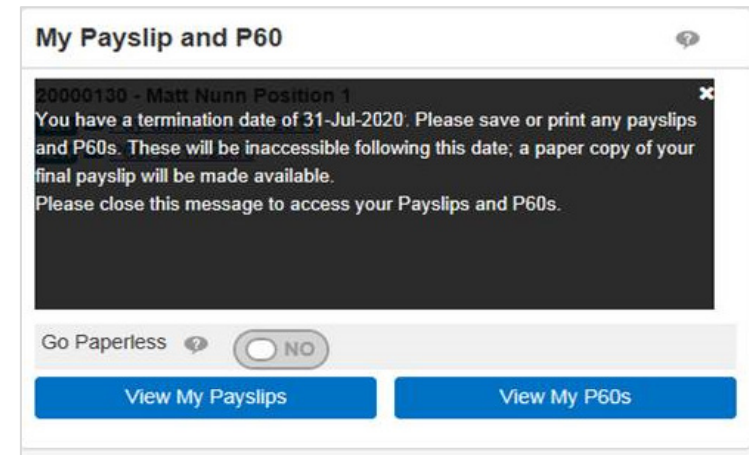
6

Leavers and Exceptions

If you choose to change the Paypoint field to Default Home, the use of the Payslip to Home field is irrelevant. The Payslip to Home field can be used to override the Paypoint field in the Payslip and Copy Payslip reports. For example, if an assignment is allocated to a Paypoint e.g. Site A, but the Payslip to Home flag is set to Yes, the assignment will continue to be in the Paypoint for all reports that use Paypoint for selection and sorting, but the payslips will be produced using their home addresses. The table below provides information on where the payslip would be addressed to, dependent upon how the Paypoint and Payslip to Home flags are set:

People Group – Paypoint field	Assignment Descriptive Flexfield – Payslip to Home field	Payslip addressed to
Site A	Yes	Home
Site A	No	Site A
Site A	Blank	Site A
Default Home	Yes	Home
Default Home	No	Home
Default Home	Blank	Home

When run, the NHS Pay Advice process will automatically produce paper payslips for leavers, recognising their termination details. It is important to note that when a termination date has been entered for an Employee, a message will be displayed in their 'My Payslip and P60' Portlet available from their My ESR Dashboard as follows:



The message banner will be displayed as a transparent overlay within the body of the Portlet.

The User will need to close this message by selecting the cross at the top right of the banner to access the Payslip and P60 links.

NOTE: this message will be displayed each time the user logs in until their termination date. When an employee moves to another NHS organisation, their payslips from their previous NHS organisation will not be available within their new NHS organisation, therefore it is important that prior to their leave date that they download their payslips and save them to an appropriate location where they are able to access them when needed after they leave their current NHS organisation. It is critical as part of your organisation's communications, that staff are aware that they need to download their payslips before they leave.

6

Leavers and Exceptions

Maternity / Long Term Sick etc.

Employees on maternity are able to access their My ESR Dashboard, negating the need to provide them with a paper payslip if they have already been opted out of receiving paper payslips. If however, an organisation is rolling out ESS or ESSLA when implementing online payslips, organisations may choose to provide their employees who are on maternity during the rollout phase, with paper payslips. If the employee has been opted out of paper payslips, either at Trust or individual level, they will be automatically eligible to receive a printed payslip to their home without having to manually amend their Print Payslip/P60 EIT back to Yes to print and the Paypoint against the Group field on their assignment to Home.

The printing of the payslip will then rely on Payroll either creating an assignment set for those on maternity and including them in the NHS Pay Advice print job, or printing the payslip locally as mentioned in the leavers section via the Payroll, Finance or HR URPs – please see the [How to view an online payslip](#) section.

Employees on long term sick are also able to access their My ESR Dashboard, again negating the need to provide them with a paper payslip if they have already been opted out of receiving paper payslips. Like maternity though, if an organisation is rolling out ESS or ESSLA when implementing online payslips, organisations may choose to provide their employees who are on long term sick during the rollout phase, with paper payslips. If the employee has been opted out of paper payslips, either at Trust or individual level, they will not be automatically eligible to receive a printed payslip.

The printing of the payslip will rely on Payroll either creating an assignment set for those on long term sick and including them in the NHS Pay Advice print job, or printing the payslip via the Payroll, Finance or HR URPs – please see the **How to view an online payslip** section. There is not a requirement to manually amend the Print Payslip/P60 Assignment EIT field if the LTS employees are to be included in an assignment set for printing, however the Assignment – People Group – Paypoint field, OR Assignment Descriptive Flexfield – Payslip to Home field will need to be set manually amended, please refer to the Leavers section above for further information.

Once it has been established as to who is on maternity and long-term sick, assignment sets can be created for each group as per the instructions in the [How to create an assignment set](#) section above. If numbers are large, it may be advisable to [Create an assignment set using Web ADI](#).

The employees within the assignment set should be reviewed and amended as appropriate each period to ensure that employees who have returned are no longer in the assignment set to have their payslip printed.



More Information

If you would like more information or if there are further details, you need regarding switching to online payslips then contact your [NHS ESR Functional Account Manager](#).