

NEW CHAIR OF THE NATIONAL USER GROUP



Carol Robinson – ESR NUG Chair

The NHS central team is delighted to announce the appointment of Carol Robinson as the first user chair of the ESR National User Group (NUG). Carol has been selected by the members of the current NUG and will assume the role with immediate effect. Please see a biography for Carol below:

Carol Robinson – ESR NUG Chair

Carol is a graduate in Public Administration and has worked in the NHS for over 24 years, having held a variety of positions in HR at Leeds Teaching Hospitals NHS Trust for the last 18 years.

Carol is currently an Assistant Director of HR at Leeds Teaching Hospitals with overall responsibility for the ESR expansion programme, offering specialist knowledge

and experience in Medical Staffing, Workforce Information and Planning and ESR.

Carol has led a number of projects whilst working within the NHS, including the implementation of the Consultant contract in 2003 as well as the implementation of ESR. The Leeds health economy went live with ESR in 2005 and are continuing with a programme to fully implement Manager and Employee Self-Service, OLM, ESR linked to NHS Jobs recruitment, the National Learning Management System and exploring electronic rostering solutions.

Being one of the Pilot sites for ESR, Leeds have shared their experiences across the NHS and Carol has attended a number of national ESR events on the benefits of using ESR.

Self Service 'how to' guides

The National Self Service Special Interest Group (SIG) is putting together a set of "how to" user guides. These will be stand alone documents to assist with frequent tasks. They are not intended to replace the ESR User Manual.

The SIGs intention is for the guides to be used as a starting point by Trusts and can be localised with individual Trust policies and procedures. The aim is to help Trusts with implementation through an agreed approach from the national group.

The guides are currently going through an internal review process within the national SIG membership and will be made available to Trusts via Kbase.

Guides are being prepared on:

- Assignment Changes
- End Employment
- External Learning
- Learning
- Location
- Personal and Employment Information
- Property Register
- Qualifications
- Registrations and Memberships
- Reports
- Sickness Absence
- Supervisor.

For further information please contact your region's representative on the National Self-Service SIG.

Reports update...

The second Reports Newsletter was published on 26 January 2009. The newsletter provides a summary of the work that has been undertaken in the reporting area over the past twelve months, some highlights are below:

Absence Reporting:

There has been significant development work for Absence reporting with the new NHS Absence Timeline report released in September 2008. The Timeline report is now based on a new folder "Assignment Absence Rate Details" which was added to this business area and has four worksheets compared to the previous eight. Provision of a parameter for Absence Category enabled this reduction.

Additional worksheets for Monthly and Quarterly Estimated Costs were included as part of release 5.4 in November 2008. These new worksheets are based on the same summary data as the other Absence Timeline reports so provides comparable and consistent data. The Absence Timeline report has also been shared within Self Service to allow managers to report on time lost within their departments.

Reports Review:

The review of ESR Standard Reports has continued throughout 2008 and into 2009. It is anticipated that all reports will have been reviewed by the end of February and any resulting changes will be impacted by McKesson prior to planning into future development releases. There are significant changes to OLM reports planned for release 5.6 in June. There will be new parameters and data items for the NHS Career Management Competency Analysis workbook, along with a new worksheet for NHS Litigation

Authority reporting on training. The NHS Education and Learning Analysis workbook will also have new parameters and data items with new worksheets becoming available for Attendance Sign In, Learning Path Subscriptions and Individual Learning Path Report.

The review required a significant amount of work by National Special Interest Group members, as there were a total of 222 worksheets to review. We would like to take this opportunity to thank those regions that have taken up the challenge to influence changes to these standard reports.

A summary document detailing all the proposed changes from the review and information on the levels of regional input will be made available on completion of all report reviews.

Captivate:

A Captivate storyboard (e-learning class) is being put together on advanced Discoverer skills. The purpose of this is to address some of the common themes and ad-hoc discoverer calls being raised and dealt with by the NHS. This course will contain a number of modules including writing conditions and calculations.

Documentation:

The Reports Manual has been updated to release 5.4.1 along with the Discoverer A-Z list and can be found on Kbase –

<http://esr.knowledgesolutions.com/default.asp?id=3070&SID=&Lang=1>

Dashboard Reporting:

ESR Dashboard Reports equivalent to those available in the Data Warehouse have now been released.

The full list of new reports available is:

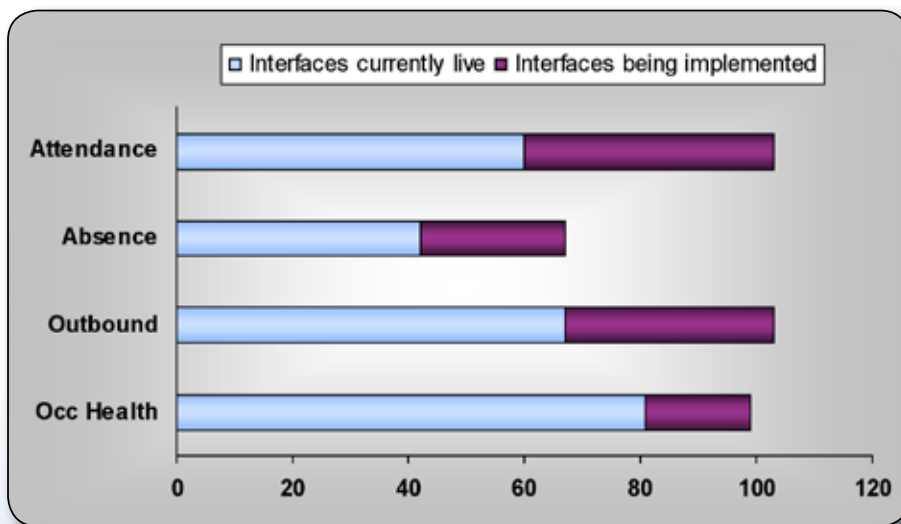
- NHS HR Dashboard – Leavers
- NHS HR Dashboard – Pay Bill
- NHS HR Dashboard – Position Budget Gap Analysis
- NHS HR Dashboard – Position Requirements Gap Analysis
- NHS HR Dashboard – Reviews
- NHS HR Dashboard – Sickness Absence
- NHS HR Dashboard – Staff in Post
- NHS HR Dashboard – Starters
- NHS HR Dashboard – Statutory Employment Checks
- NHS HR Dashboard – Turnover Rate
- NHS HR Dashboard – Vacancies.

Further information on the content of forthcoming releases can be found the ESR Development Schedule which is available on Kbase – <http://esr.knowledgesolutions.com/default.asp?id=3185&SID=&Lang=1>

NHS ESR Interface team news

The number of NHS Organisations live on the Generic Inbound and Outbound interfaces continues to increase as the NHS Interface Team implements on average five new interfaces per month. ESR is now sending and receiving ESR information from many third party systems particularly in the areas of Rostering and Occupational Health.

As well as maintaining a working relationship with existing 3rd party suppliers, the NHS Interface Team is constantly working with new 3rd party system suppliers to enable their systems to make use of the Generic Interfaces. Most recently and for the first time, test files from an expenses system have been successfully loaded in to ESR. The pilot organisation were able to run this interface successfully against a sample set of employee's and are looking to roll out to a further 300 to 400 employees from April 2009. Other expenses system providers are in dialogue with the NHS Interface Team and are looking to start testing over the coming months.



ESR Interfaces

For more information about the third party system providers ESR is currently interfacing with, please see the NHS0013 Suppliers document which can be found on Kbase. This document also provides the details of the organisations that are live on the interfaces with the specific suppliers.

For any inquires or to request the implementation of a Generic Interface, please log a Service Request via the ESR Help Desk. The lead time required to implement these interfaces is 6 weeks following which the interface will be available for testing and live implementation purposes.

New Annual Leave Accrual Plans in ESR



In August 2008, the NHS Development Team began a detailed review of Agenda for Change Accrual Plans. This was

done in conjunction with a number of key users and also ratified by the National Special Interest Group for HR and Recruitment. As a result new Annual Leave Hours Accrual plans have been developed ready for use in April 2009.

The new plans will be relevant for staff with Agenda for Change Terms and Conditions and also for Bank Staff where rolled up holiday has been removed in line with the Working Time Directive Regulations.

Current Agenda for Change Accrual Plans

The current Agenda for Change plan is based on the number of hours worked within a set number of days per week. This is suitable for staff on standard shifts, but does not allow for accurate calculations of leave entitlement, leave taken by part-time staff or staff working non-standard shifts.

A number of proposals were tabled and discussed with NHS colleagues – Gail Hird, Head of Workforce Information at Leeds Partnership Foundation Trust and Gordon Hancock, Head of Financial Systems (including Time and Attendance System) at University Hospital Birmingham NHS Foundation Trust.

Concerns Identified by Users and the NHS Central Team

The following key areas were identified during this piece of work:

- Incorrect calculations of annual leave entitlements for part-time staff. This also had an impact on organisations using third party Time and Attendance systems to record annual leave
- Inability to include Public Holiday entitlements in part-time staff entitlements
- Misunderstanding of how the system calculated annual leave entitlement based on length of NHS service

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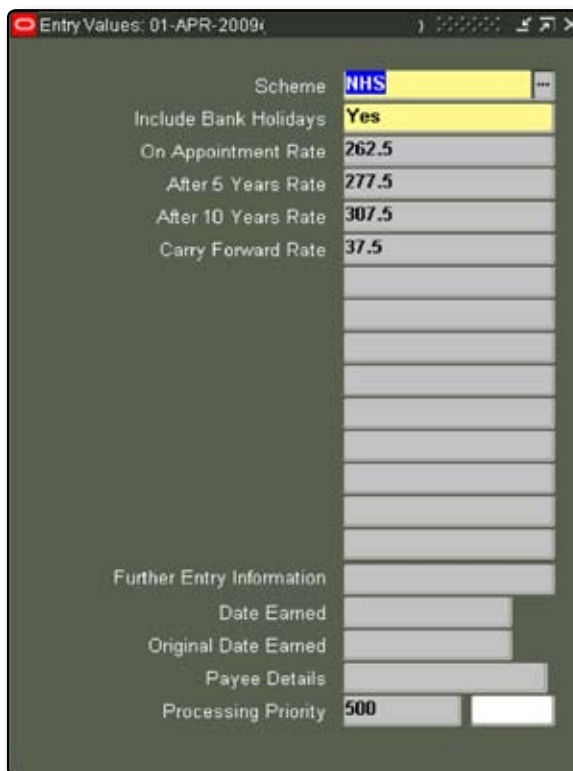
- The annual leave entitlement was not being reduced by annual leave taken
- An accrual plan was needed for Bank Staff to support the Working Time Directive (WTD) regulations, which removed 'rolled up holiday pay' i.e. paying a percentage in respect of holiday pay in each pay period.
- A report was needed to calculate end of year outstanding annual leave to comply with the new International Financial Reporting Standards.

1. New Plans

It was agreed to develop a new Bank Annual Leave Accrual Plan and a new Agenda for Change Accrual Plan based on hours of work and multiplied by weeks of entitlement. The new accruals are calculated to the nearest 15 minutes. The current accrual plans will be retained and organisations can choose to retain their use if required.

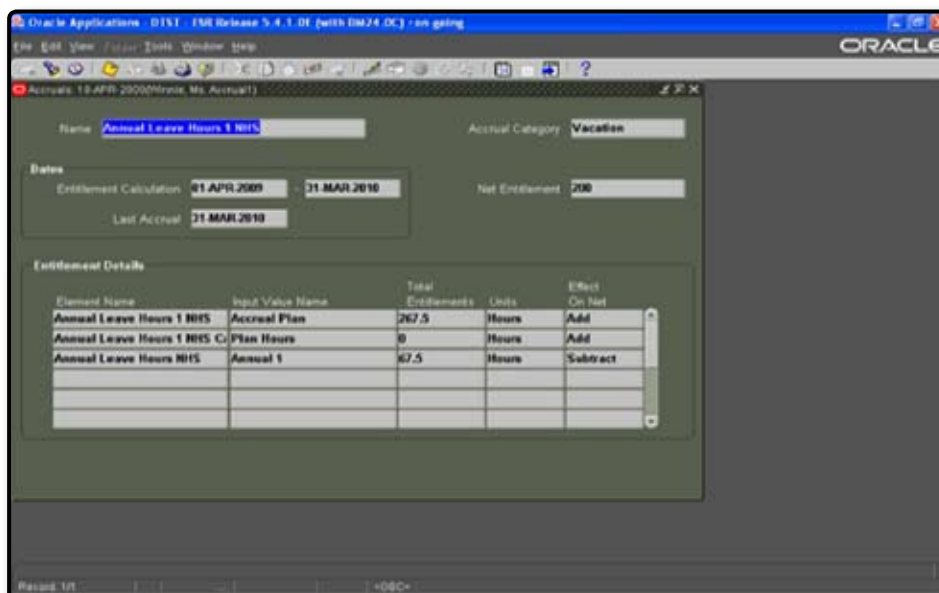
The new Agenda for Change Accrual Plan will express annual leave entitlements in hours and will calculate the entitlement pro-rata to the Full Time Equivalent (FTE) of the assignment, making it more accurate for part-time staff.

'The new plans will be relevant for staff with Agenda for Change Terms and Conditions and also for Bank Staff where rolled up holiday has been removed in line with the Working Time Directive Regulations.'



Field	Value
Scheme	NHS
Include Bank Holidays	Yes
On Appointment Rate	262.5
After 5 Years Rate	277.5
After 10 Years Rate	307.5
Carry Forward Rate	37.5
Further Entry Information	
Date Earned	
Original Date Earned	
Payee Details	
Processing Priority	500

Screen shot 1: Users will be able to attach an element to the assignment and select whether or not the annual leave entitlement should include or exclude general public holidays. Whilst this is a requirement for part-time staff, research showed that this would also be useful for full time staff on Time and Attendance systems e.g. nursing staff



Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
Annual Leave Hours 1 NHS	Accrual Plan	267.5	Hours	Add
Annual Leave Hours 1 NHS C	Plan Hours	0	Hours	Add
Annual Leave Hours NHS	Annual 1	67.5	Hours	Subtract

Screen shot 2: ESR will calculate the entitlement for the whole of the current year, taking account of part-year starters and previous service. The entitlement for the whole of the current year will be viewable via the Accruals form and will show the net entitlement as leave is taken

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The main features of the new Agenda for Change Accrual Plans are detailed below:

- There are five new accrual plans for non-Bank Staff. The plan names will be **Annual Leave Hours n NHS** (*n* represents the number of the plan from 1 to 5). A separate plan is required for each assignment that an employee holds
- A new element is provided to allow override of entitlement calculation to support more complex in year changes where required e.g. an employee moves from full time to part time hours during the leave year
- An additional field in both Self-Service functions and Core Application Forms on the people screen to record NHS aggregated service in years and days to drive entitlement for annual leave
- A new process to automatically migrate from existing to new Accrual Plans
- The ability to calculate entitlement for the leave year based on previous service including aggregated previous service and where the entitlement allowance increases part way through the year (i.e. where the employee attains their 5 or 10 year anniversary), calculating their entitlement on a pro-rata basis.

2. Bank Staff

Separate accrual plans will be available for Bank Staff as the calculation of their entitlement will be based upon Bank Hours worked rather than FTE (which is always zero).

Main features of the new plans – Bank Staff:

- Five new accrual plans for Bank Staff. The plan names will be Bank Annual Leave Hours *n* NHS (*n* represents numbers from 1 to 5).
- A new element to affect the payment of accrued annual leave to Bank Staff
- A new process to automatically migrate from existing to new accrual plans

3. Time and Attendance and Third Party Interface

One of the user requirements was for the accrual plans to work positively with the various Time and Attendance systems in place.

Third party suppliers have been advised about the new plans and organisations will need to work with their suppliers to ensure that their system functions correctly.

4. New Report to support the International Financial Reporting Standards

A new report is currently being scoped in collaboration with members of the National HR and Recruitment and Finance Special Interest Groups. The report will be available for use at the next financial year end in 2010. A further update will be provided in due course.

Migrating to the new plans

An automated process for migrating from existing annual leave accrual plans to the new accrual plans has been developed. This process allows the user to define assignments for migration based on parameters which include Staff Group and part-time or full-time employees. The user can also define whether the migration will include general public holidays.

The NHS Development Team would like to take this opportunity to thank Gail Hird and Gordon Hancock for their contributions towards resolving this issue.

If you have any queries, please contact Maria Scott, ESR Development Consultant at maria.scott2@nhs.net

'New Annual Leave Hours Accrual plans have been developed ready for use in April 2009.'

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