

## Manager Technical Guidance – Pay Progression Manager

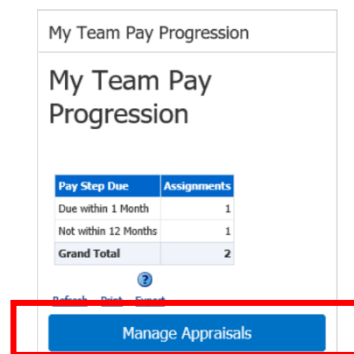
### Dashboard

The 2018 Framework agreement on the reform of Agenda for Change (AfC) introduced provisions to move to a new pay system with faster progression to the top of the pay bands through fewer pay step points.

Employees are expected to demonstrate that they should progress through the new pay structure and this guidance is specifically designed to show you how to open their pay step via the ESR Manager dashboard.

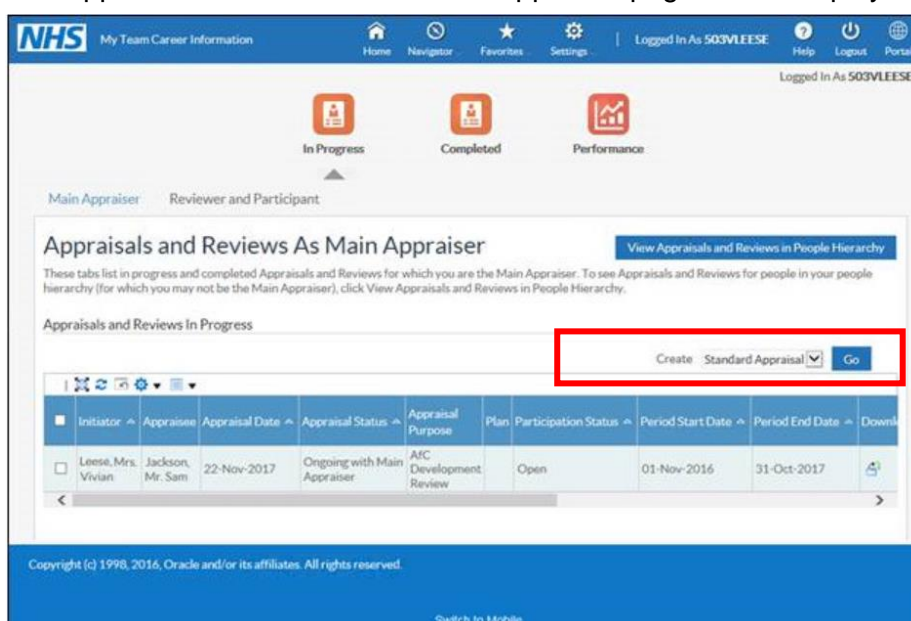
The below guidance walks you as a manager through the Pay Progression section of the ESR Manager dashboard.

1. Log in to [My ESR](#) and open your Manager Dashboard
2. If you are unsure how to view your Manager part of ESR refer to the [Manager Access Guidance](#)
3. Click on My Team Pay Progression Portlet (Information box)



4. Click the **Manage Appraisals** button in the **My Team Pay Progression** portlet.

The Appraisals and Reviews as Main Appraiser page will be displayed.



- Click on the **Go** button next to the **Create** drop-down menu to create a new standard appraisal.

Create Standard Appraisal

- Click the **Action** icon in the row containing the appropriate Employee's name.

**NHS** My Team Career Information Home Navigator Favorites Settings | Logged In As 503VLEESE Help Logout Portal

Name  Go Advanced Search My List

### Create Standard Appraisal: People in Hierarchy

**TIP** Click the action button next to the employee you wish to action. Click the details button for more information about the employee.

Focus	Name	Assignment Number	Job	Organisation	Action	Details
<input type="checkbox"/>	Leese, Mrs. Vivian					
<input type="checkbox"/>	Atkins, Mrs. Kerry	20000245	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Ayres, Mrs. Pamela	20000929	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Baker, Mrs. Yve	20000245	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Dixon, Mr. Simon	20000029	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Johnson, Mr. Andrew	20000271	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Lane, Miss Sarah	20000485	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Martin, Miss Elizabeth	20000470	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		
<input type="checkbox"/>	Mistry, Mr. Sandeep	20000290	Nursing and Midwifery Registered Staff Nurse	503 Ward 10		

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This will open the Pay Progression Appraisal form.

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### Create Standard Appraisal: Setup Details

Cancel Save and Close Add Details

Step 1 of 2

Employee Name Johnson, Mr. Andrew  
Employee Number 20000271

#### Setup Details

**TIP** You cannot change the appraisal template or the assignment after clicking Next.  
\* Indicates required field

Review Type

Period Start Date

Period End Date

Template

Appraisal Date

Next Appraisal Date

Assignment Number 20000271

Main Reviewer Leese, Mrs. Vivian

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- Select the required review type of **Pay Progression Meeting** from the **Review Type** drop-down menu – as **Pay Progression**.

Review Type

- Enter the start date of the review period in the **Period Start Date** and **Period End Date**.

Period Start Date

Period End Date

**NOTE:** The Period Start and End dates should refer to the previous year in which progression is dependent on e.g. if the pay step is on 1<sup>st</sup> May 2021 the **Period Start Date** will be 1<sup>st</sup> May 2020 and the **Period End Date** will be 30<sup>th</sup> April 2021

9. Click on the **Search** icon next to the **Template** field to search for a template.



10. This will open the Template Search and Select box.

Search and Select: Template Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Appraisal Template Go

Results

Quick Select	Appraisal Template	Date From	Date To	Questionnaire Name	Competency Template	Objective Template	Description
No search conducted.							

11. Click the **Go** button to search for all templates and choose the '**Pay Progression Meeting**' option by clicking Click the **Quick Select** icon next to it

Search and Select: Template Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Appraisal Template %REv Go

Results

Quick Select	Appraisal Template	Date From	Date To	Questionnaire Name	Competency Template	Objective Template	Description
<input type="radio"/>	AFC Development Review	01-Jan-1951		KSF Review	KSF Assessment Type	KSF Review	
<input type="radio"/>	General Review	01-Jan-1951		KSF Review	KSF Assessment Type	General Review	
<input type="radio"/>	NMC Revalidation Tracker	01-Jan-1951		NMC Revalidation Appraiser		General Review	
<input type="radio"/>	Pay Progression Meeting	01-Jan-2019		Pay Progression Meeting			Template to record the outcome of the Pay Progression Meeting

12. The Appraisal Date defaults to today's date. If required, enter an alternative date in the **Appraisal Date** field. Record the date you hold the Pay Progression meeting.

13. Leave the **Next Appraisal Date** field blank.

14. Click **Add Details**

**Note.** if you don't have an **Add Details** option use the **Save and Close** OR **Save and Proceed** button (whichever option you see on your screen)

15. This will take you into the **Create Standard Appraisal: Overview** screen.

**Note.** if you don't see this screen but are taken back to the Appraisal screen scroll to the right of the screen to find and click on the 'pencil' icon

Appraisals and Reviews In Progress

Create Standard Appraisal Go

Initiator	Appraiser	Appraisal Date	Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Delete
		01-Apr-2021	Saved	Pay Progression Meeting		Open	31-Mar-2020	01-Apr-2021		<span>Browse...</span>						

16. This is where an overall rating for the Pay Progression should be entered.

17. Click the **dropdown arrow** next to the Overall Rating field.

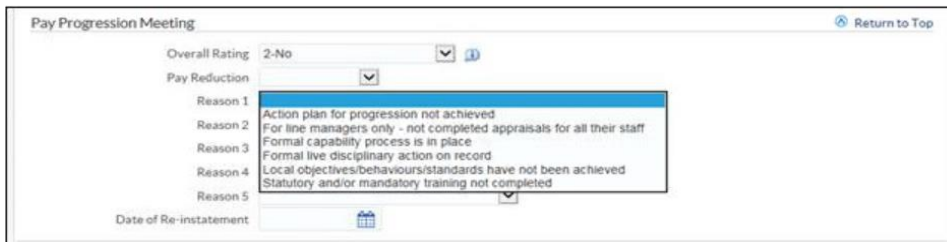


The following options are available:

**Yes** - The appraisee progresses on to the next pay point. There is no change to the existing process and no further action is required.

**No** - The appraisee does not progress on to the next pay point.

If an Overall Rating of No has been selected, you **MUST** add in a reason in the **Reason 1** field.



You can add more than one reason if you need to.

18. If **No or Yes following initial deferral** - add in a Date for Re-instatement.

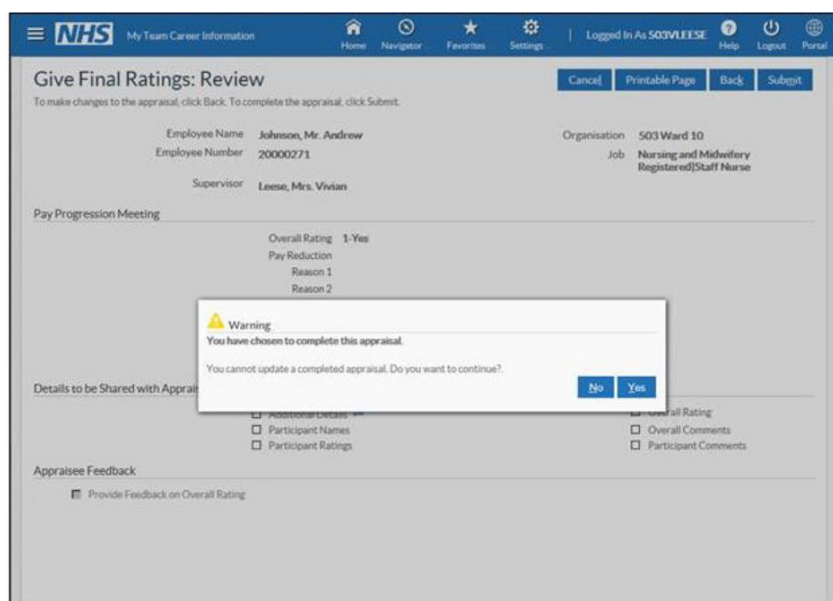


19. Click the **Save and Proceed** button to continue.

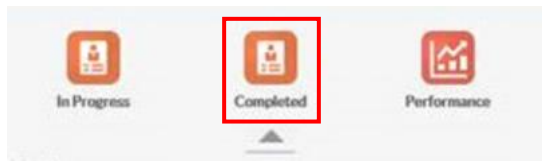
20. The information entered for the Pay Progression Meeting is displayed for review.

21. Click the **Submit** button to complete the Pay Progression.

22. A warning message is displayed advising a completed appraisal cannot be updated. If you are happy with the details you've entered click the **Submit** button to complete the Pay Progression.



23. If you need to view the details again click on **Completed**.



If you want to check that the details you have submitted have saved refer to