

Pay progression

Scenarios

These scenarios should be read alongside annex 23 and the [pay structure](#) set out in annex 2 of the NHS Terms and Conditions of Service Handbook. This shows the new pay points for the three years up to 2020/21 and how they change as a result of the deletion of pay points combined with the annual cost of living awards agreed in the [three-year framework agreement](#).

More information on how to read the new pay scales, covering both progression and cost of living elements is provided in the [reading your pay journey guidance](#). The [pay journey tool](#) details how the basic pay of individual staff in England will change during the transitional period to the new pay system.

The scenarios assume that, at the end of the three-year deal, annual pay awards continue to be applied to pay step points effective each April.

The scenarios have been produced for illustrative purposes and therefore might not account for every circumstance.

Transition

Scenario 1

Maisie was employed in a band 2 job before 1 April 2019 and her organisation had not implemented the NHS Staff Council's 2013 pay progression agreement. She has a pay step date (previously called increment date) of 1 August. She was on pay point 5 in the band on 31 March 2018 and since then her salary has moved up to £17,460 effective 1 April 2018. On 1 April 2019 her salary moves to £17,652 in line with the cost of living award under the three-year pay deal.

On her 1 August 2019 pay step date she automatically progresses to the next pay step of £17,983. On 1 April 2020 her salary moves to £19,337, the top point of the band, in line with the cost of living award under the three-year pay deal.

Maisie will continue to have annual appraisals. As she is already at the top of the band, the implementation of the new pay progression system from April 2021 will not affect her – unless she moves to a higher band.

Scenario 2

Millie was employed in a band 5 job before 1 April 2019 and her organisation had not implemented the NHS Staff Council's 2013 pay progression agreement. She has a pay step date (previously called incremental date) of 1 February. She was on pay point 17 on the band on 31 March 2018 and since then her salary has moved up to £23,023 effective 1 April 2018.

On her 1 February 2019 pay step date she automatically progresses to the next pay step of £23,951. On 1 April 2019 she moves to £24,214, in line with the cost of living award under the three-year pay deal. On her 1 February 2020 pay step date she automatically progresses to the next pay step of £26,220. On 1 April 2020 Millie moves to £26,970 in line with the cost of living award under the three-year pay deal.

On her 1 February 2021 pay step date she automatically progresses to £27,416. As this point is a transitional point that will be removed from the structure from 1 April 2021 she will automatically progress to the top of the band on 1 April 2021.

Scenario 3

Fernanda was employed in a band 7 job before 1 April 2019 and her trust had not implemented the 2013 pay progression agreement. She has a pay step date (previously called increment date) of 23 November. She was on point 27 in the band on 31 March 2018 and since then her salary has moved up to £33,222 effective 1 April 2018. On her 23 November 2018 pay step date she automatically progressed to the next pay step of £34,403.

On 1 April 2019 she progresses automatically to £37,570 as a result of the cost of living award and the deletion of the next pay point up under the three-year pay deal (process of removing the overlaps between bands). She receives no further increase on her 23 November 2019 pay step date as she has already had her progression in April.

On 1 April 2020 Fernanda progresses automatically to £40,894 as a result of the cost of living award. She receives no further increase on her 23 November 2020 pay step date as she has already had her progression in April.

In April 2021 she will receive the annual cost of living award (the value of which is not yet known), and on her 23 November 2021 pay step date she will be eligible to progress to the top of the band. However, this will not be automatic, it will be subject to meeting the standards required under the new pay progression system.

Scenario 4

Joanne commenced employment on 1 April 2018 and her organisation had implemented the 2013 pay progression agreement. She has a pay step date of 1 April 2019. Joanne had an appraisal in September 2018 and is due to commence maternity leave on 1 March 2019. Arrangements for her pay progression during this period will be as set out in the organisation's existing policy on pay progression and in line with the provisions in section 15.23 of the NHS Terms and Conditions of Service Handbook.

New starter employed from 1 April 2019

Scenario 5

Jane commences employment on 1 May 2019 on £21,089 (2019/20), the entry point of band 4 and therefore has a pay step date of 1 May 2022. Jane is subject to the new pay progression system. She has annual appraisals in January 2020, January 2021 and January 2022. As a result of the deletion of her pay point and the annual cost of living award on 1 April 2020 her

salary moves to £21,892. This is then increased again by the annual cost of living awards for April 2021 and April 2022 (the value of which is not yet known).

In April 2022, Jane's manager invites her to a pay step review meeting where they review whether all the standards have been met. This discussion draws on the most recent appraisal from January 2022. Jane's manager confirms she has met the standards. Jane moves to the top of band 4 effective from 1 May 2022.

Delayed progression

Scenario 6

Julie commences employment on the entry point in band 5 on 1 August 2019 and therefore has a pay step date of 1 August 2021. Julie is subject to the new pay progression system. She has appraisals in December 2019 and December 2020 and her salary is updated by the annual cost of living awards in April 2020 and April 2021.

Julie's manager invites her to a pay step review meeting in June 2021 where they review whether the standards have been met, drawing on the outcomes from her December 2020 appraisal. Her manager confirms that she has met her objectives and organisational standards, but she is only 90% compliant with her statutory and mandatory training. The manager checks that Julie had access to the training and that there were no factors beyond her control that prevented her from completing the training. The manager defers her pay step progression. During the meeting they agree a plan for when and how this will be completed.

Julie completes all her training by 1 September 2021 and provides proof of this to her manager at a further pay step review meeting where they review progress. The manager follows their local process to authorise the pay step effective from 1 September 2021 (a delay of one month) and Julie progresses to the intermediate point in band 5. Her next pay step is due on 1 August 2023 when she is eligible to progress to the top of the band.

Scenario 7

Jim commences employment on 1 June 2019 on the entry point of band 6. His first pay step is due on 1 June 2021. He receives a disciplinary warning on 1 May 2021 for a period of six months. At his pay step review meeting in May 2021 Jim's manager confirms that his pay step can't be paid until the sanction expires. Jim therefore gets his pay step point effective from 1 November 2021. Jim is on band 6 so his next pay step date is due on 1 June 2024 when he is eligible to progress to the top of the band.

Scenario 8

Jayden commences employment on 1 October 2019 on the entry point of band 2. His first pay step is due on 1 October 2021. At the beginning of 2021, his manager raises concerns that he is not meeting the required standards. They formulate an action and support plan. Even with interventions, Jayden has still not met his requirements by 1 June 2021 and is put into a formal capability process.

At his pay step review meeting in September 2021, Jim's manager confirms that his pay step can't be paid until he meets expectations and the capability process is complete. On 15 December 2021, Jayden comes out of the formal capability process. His manager confirms in a pay step review meeting that Jayden's pay step will be paid effective from 15 December. Jayden is on band 2 so he has now reached the top of the band.

Scenario 9

Jeff commences employment on 1 April 2019 in band 5 and therefore has a pay step date of 1 April 2021. Jeff is subject to the new pay progression system. He has an annual appraisal in December 2019 and again in December 2020. At the December 2020 appraisal his manager informs him that he is not meeting his objectives and they agree to have ongoing discussions and develop a plan. Jeff's manager invites him to a pay step review meeting in March 2021 where they review whether the standards have been met. The manager states that Jeff has still not met his objectives, so defers his pay step progression, but Jeff decides to contest the decision.

If his case is not upheld, then the decision stands and Jeff's pay step eligibility will be delayed until he has met his objectives. If this is upheld the pay step progression will be backdated to 1 April 2021.

Progression and the interaction with periods of absence

Scenario 10

Jessica commenced employment on 1 May 2019 on £24,214, the entry point of band 5. Jessica has an appraisal in September 2019 and is due to commence maternity leave on 1 July 2020. She will receive the annual cost of living award on 1 April 2020, taking her salary to £24,907, and another annual cost of living award in April 2021. Her pay step date is due on 1 May 2021, but Jessica is only due to return from maternity leave on 1 July 2021. To ensure she is not penalised, her manager arranges for her pay step to be paid effective from 1 May 2021 in her absence, and she progresses to the intermediate point in the band.

Scenario 11

Joaquin commences employment on 1 September 2019 on the entry point of band 7. Joaquin commences long term sickness on 1 February 2021 and is absent until 31 October 2021. His pay step is due on 1 September 2021. There were no concerns about his performance, he had undertaken an appraisal, met the organisational standards and his statutory and mandatory training was up to date at the time he went off sick. The manager follows the local process to authorise the pay step in his absence. Joaquin moves to the intermediate pay point in band 7 effective from 1 September 2021.

Scenario 12

Johan commences employment on 1 April 2019 on the entry point of band 3 at £18,813 so therefore has a pay step date of 1 April 2021. His pay will increase to £19,737 on 1 April 2020 in line with the annual cost of living award under the three-year pay deal. He has an appraisal in September 2020 and is due to commence adoption leave on 1 March 2021. His appraisal was successful and before he starts his period of authorised leave his manager

meets with him to confirm that he has, to date, met the pay progression standards and his pay step will be applied in his absence on 1 April 2021 taking his pay to the top of the band.

Scenario 13

Misha commences employment on 1 August 2019 on the bottom of band 6 so therefore has a pay step date of 1 August 2021. Her pay will increase to £31,365 on 1 April 2020 in line with the annual cost of living award under the three-year pay deal. She has an appraisal in January 2021. Her appraisal is unsuccessful, and she is set a number of targets for improvement. In the meantime, her pay will increase again on 1 April 2021 in line with the annual cost of living award. She is due to commence maternity leave on 1 June 2021. Unfortunately, she does not meet the targets before she commences her leave, so her manager meets with her and informs her that her August pay step will be delayed.

She returns to work on 1 December 2021 and within one month meets the targets that had been set. Her manager meets with her and they agree that due to satisfactory completion, the pay step point will be backdated to an agreed date of 1 September 2021, one month after her pay step date. This puts her in the same position as if she had completed the improvement process without being absent.

Scenario 14

Delroy began his employment on 3 June 2019 in a band 5 position. He therefore has a pay step date of 3 June 2021. He has an annual appraisal in May 2020 which is positive. Agreement is reached to allow him to take a short unpaid career break of six months' duration beginning on 6 July 2020.

Delroy returns to the same role on 6 January 2021. Following a successful appraisal and pay step review meeting in May 2021, he progresses to the intermediate point in the band on 3 June 2021. His ability to progress is not held up by the fact that he had a career break.

Mitigating circumstances

Scenario 15

Suki has a pay step date of 1 April 2021. Suki is due to have her appraisal in March 2021, but it is cancelled due to organisational issues which were beyond her control. She has met all the other standards required. Her manager takes full account of these factors and agrees that she should not be disadvantaged by organisational issues and authorises the pay step, so she gets her pay step from 1 April 2021. Her manager also ensures that the appraisal is re-scheduled as soon as possible.

Scenario 16

Stanley has a pay step date of 1 July 2021. He has a face-to-face mandatory training session arranged in June 2021 but due to a family bereavement he is unable to attend. In his pay step review meeting, his manager notes that he has met all the other criteria and he has not had the opportunity to attend a re-arranged session but has booked on the next available session. Due to the mitigating circumstances his manager authorises the pay step.

Scenario 17

Jill is a band 7 team leader with a pay step date of 1 May 2021 when she will be eligible to move to the intermediate point of band 7. Jill is responsible for doing the appraisals for the 8 people she directly line manages. Jill's department has been short-staffed in recent months and two of the six team leader posts are vacant. Jill is covering a second team in addition to her own, entailing a further five appraisals. Due to the additional demands on her time both to undertake the additional appraisals but also provide support and development to two teams, Jill has not been able to complete the appraisals for every member of her two teams. At her pay step review it is confirmed that she meets all the other standards so, in discussion with her manager, it is agreed that Jill will progress to the intermediate pay step in May 2021. The outstanding appraisals will be timetabled in the next quarter with priority being given to those members of the team also soon due a pay step.

Scenario 18

Jacob is a band 8b service development manager. His appraisal objectives are stretching and far-reaching as is appropriate in this role. They include a number of objectives, the achievement of which is not wholly within Jacob's control. Jacob has been in post nearly five years and is approaching his pay step date. He is a highly-regarded and high-performing senior member of staff. This year, however, a number of Jacob's objectives have not been met or have only been partly met. This is due to a range of factors outside his control - including short-staffing and re-prioritisation in other teams and departments within the trust, and the loss of some external funding. In discussion, Jacob and his manager agree that he will receive his pay step and move to the top point of the band. They also agree to amend the focus of future objectives to reflect the fact that elements of his work will be reliant on others, over whom Jacob does not have control.

Changing position, acting up and secondments

Scenario 19

Sanjay was employed before the 1 April 2019 in band 7. He has a pay step date of 1 July. Sanjay applies for a new position and is promoted to a new role in band 8a on 1 May 2019. Sanjay's pay step date is reset so his next pay step is now due on 1 May 2024 and he is now subject to the new pay progression system. Sanjay starts at the entry point of band 8a on a salary of £44,606. Sanjay will continue to have an appraisal each year. His salary will increase to £45,753 on 1 April 2020, and by the annual cost of living awards applicable in 2021, 2022, 2023 and 2024. Prior to his pay step date, Sanjay will have a pay step review meeting and if all the standards are met he will progress to the top of the band on 1 May 2024.

Scenario 20

Seamus applies for a position on the same band at a different organisation and starts on 1 August 2019. He will be treated as existing staff and continues to progress as he would have at his previous organisation. He will be subject to the pay progression arrangements his new organisation has in place for its existing staff (those employed before 1 April 2019).

Scenario 21

Sammy joined the NHS on 1 May 2019. Sammy takes a two-year secondment with effect from 1 July 2020 to a position in a higher band with an agreement in place between her

current employer and the employer she will be seconded to. Before the secondment she was in band 3 on £18,813 (2019/20) with one-two years' experience. When she returns to her substantive post on 1 July 2022, the two years she was on secondment in the higher band will be taken into account to calculate her pay point. Therefore, she will be treated as having three-four years' experience on a band 3 and will move to the top of band 3.

Scenario 22

William was employed in a band 2 post before 1 April 2019. He has his role re-evaluated under the local job evaluation process and this confirms that he should be re-banded to band 3. As this is not deemed a promotion, William will continue to be treated as existing staff and be subject to the pay progression arrangements his organisation has in place for its existing staff (those employed before 1 April 2019). His pay step date will become the anniversary of the agreed date that the new job description took effect, and therefore his pay journey in band 3 during transition will reflect the date that his re-banding was effective from.

Scenario 23

Sandra started in a band 3 job in September 2019 where she is on the entry point with a pay step date due September 2021. From 1 July 2021 she acts-up into a band 4 position for six months. In September 2021, although she has met all the pay progression standards, her band 3 pay step, which would take her to the top of the band, is not applicable as she is being paid at the entry point for band 4 while on secondment which is higher than the top of band 3. When she returns to her substantive post on 1 January 2022, she meets with her manager to confirm that she has met all the pay progression standards and as her pay step is deemed to have occurred, so she is paid at the top of band 3 from this date.

Scenario 24

Marcia began her employment on 1 April 2019 in a band 4 post, she therefore has a pay step date of 1 April 2022. She was finding the work stressful and had a difficult appraisal in February 2020 when she was told that she would need to make some significant improvements and was given an action plan to follow by her manager.

Marcia had previously been employed for four years at a different NHS organisation in a band 3 position where she had been very successful and had progressed each year with no issues. Marcia volunteered to take on a similar band 3 post with her new employer which was agreed. She began her new band 3 position on 20 March 2020. Her pay step date is reset to 20 March.

She began her new band 3 position in March 2020 and her organisation agreed her salary would be £19,332 (the pay point for those with four-five years' experience) to reflect her previous experience. On 1 April 2020 her pay rose to £21,142 as a result of the cost of living award under the three-year pay deal. Marcia is now at the top point in the band. She continues to have annual appraisals and benefits from annual cost of living awards.

Scenario 25

Samuel commenced employment in the NHS in band 3 on 1 February 2016. In May 2019 he successfully applies for a band 4 post in a different NHS organisation. He commences in the

new post on 1 July 2019 on the bottom of band 4. As the new post is a promotion, the new pay progression arrangements apply to him. He has a pay step date of 1 July 2022.

Scenario 26

Ann commences employment on 1 August 2019 on the entry point of band 7 (£37,570) so therefore has a pay step date of 1 August 2021. Her pay increases to £38,890 on 1 April 2020 in line with the cost of living award under the three-year pay deal. Ann has a successful annual appraisal on 29 July 2020 where she meets the standards required of her post.

In December 2020, Ann applies for a seconded position working for her trade union/professional association commencing on 1 February 2021 for 12 months. Ann's application is successful. The terms of the secondment are agreed between both organisations.

Prior to the commencement of the secondment, Ann and her line manager agree to schedule an appraisal. This takes place on 12 January 2021. At this meeting her manager confirms that Ann has been meeting the standards for pay progression to date. Ann commences in the seconded post on 1 February 2021. Her current organisation agrees that the time spent in the seconded post will count as reckonable service.

On 1 April 2021, Ann receives the annual cost of living award. On her pay step date (1 August 2021) Ann's pay will increase to the intermediate point in band 7 (the value of which is not yet known). Upon return from secondment she will retain her next step pay date of 1 August 2024 when she will move to the top-point of the band provided she meets the pay progression standards at this time. She will continue to have annual appraisals during this time and cost of living pay increases will also apply.

Scenario 27

Bukky is working in a band 7 job following an organisational change process which saw her previous band 8a job deleted from the structure. She has three years of pay protection in line with the organisation's local policy, after which her basic salary will drop to the top point of band 7. She is not eligible for the pay step in band 8a as the local organisational policy states that basic salaries are frozen during periods of pay protection. She continues to have annual appraisals and at the end of her three years of pay protection, her salary drops to the top point of band 7. She continues to have annual appraisals and to benefit from annual cost of living awards.