



ELECTRONIC STAFF RECORD

RN594 Guide to Enhancements and Changes Release 65.0.0.0

Information classification: PUBLIC

Revision Date: JUNE 2025

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1 Introduction

The purpose of this document is to provide details of the enhancements to the ESR system in Release 65.0.0.0. The details are grouped in functionality order.

The changes to functionality outlined in this Release Notice are subject to successful testing. As is normal practice, any amendments to the content of the Release will be communicated in a revised Guide to Enhancement Notice.

NOTE: All Employee data used in this publication is fictional. Any similarity with the names used in this publication with the names of actual persons is purely coincidental and not intentional.

2 Liferay Portal – Content Staging Removal and Publications

The underlying functionality for publishing content to the ESR Hub and Portal has changed. The Staging Server has been removed and replaced with 'Publications'.

A Publication is a user-specific environment where changes are held until they are ready to be published to the Production (Live) environment.

This change means the following:

- Content Administrators and Content Editors will be able to publish content without reliance on the Portal Site Administrator.
- Changes can be made immediately to live content or scheduled as part of a Publication.
- As Publications are user-specific you can only view, amend and publish Publications you have created.

NOTE: If the author of a Publication is absent from work and a Publication has not been published, you should either:

- Create a new Publication containing the desired changes *or*
- Raise a Service Request (SR) for the Support Team who have access to all Publications.

Following the release (R65), any content held in Staging will no longer be available. Organisations will need to ensure that any required content held in Staging is published prior to the release weekend.

Following the release, you will no longer be able to access the Staging URL. If you should try and access any bookmarked links to the old site you will be automatically re-directed to <https://my.esr.nhs.uk>.

Full guidance on the new functionality is available in the [ESR User Manual](#) and [How to Guides](#) on the ESR Hub.

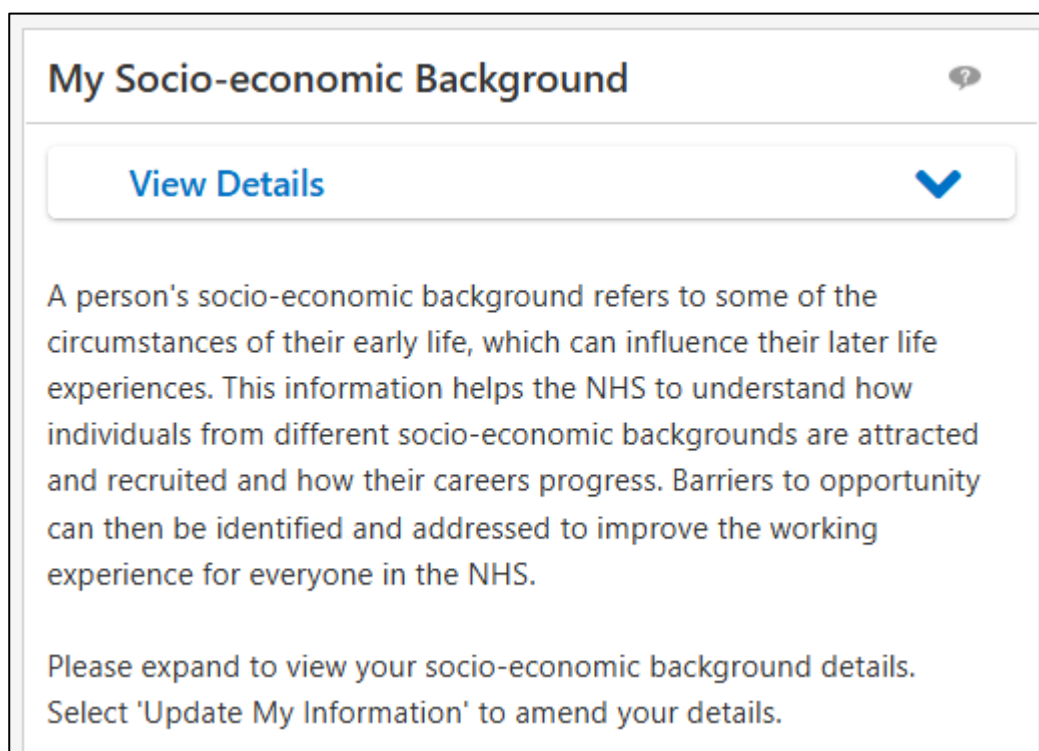
3 **Recording of Socio-economic Background Data**

Following the introduction of Socio-economic questions in Release 64 (March 2025), a further change is being delivered to introduce a Socio-economic portlet which aims to make the data completion and review process more efficient for users. This change supports national policy and is intended to accelerate local and national completion rates to help collect meaningful data.

Further information on why this data is being collected and how it will be used can be found in the [Socio-economic Background Information FAQs](#) in the National Workforce Data Set (NWD) guidance documents.


This portlet is available to be added into the My ESR dashboard and/or the Applicant dashboard. This must be enabled by the local Portal Administrator as required for your organisation.

The portlet will be collapsed by default with static text to provide context to users as to what Socio-economic data is and why the NHS is interested in collecting it:



Clicking on View Details will show the details held for the employee, there are none at this point recorded.

My Socio-economic Background

[View Details](#) 

1. Occupation of your main household earner when you were aged about 14

None Recorded

2. Type of school you attended for the most time between the ages of 11 and 16

None Recorded

3. Eligible for free school meals at any time

None Recorded

[Update My Information](#)

Clicking onto Update My Information will allow the values to be selected.

These are the same questions and answers that are available currently in the professional application and in Employee Self Service.

Dashboard
My Socio-economic Background

My Socio-economic Background

Please update your socio-economic background details and select the 'Save' button when completed.

1. Occupation of your main household earner when you were aged about 14

☐ Modern professional or Traditional professional
 Such as Teacher, Nurse, Physiotherapist, Social Worker, Musician, Police Officer (Sergeant or above), Software Designer, Accountant, Solicitor, Medical Practitioner, Scientist, Civil or Mechanical Engineer.

☐ Senior, Middle or Junior Managers or Administrators
 Such as Finance Manager, Chief Executive, Large Business owner, Office Manager, Retail Manager, Bank Manager, Restaurant Manager, Warehouse Manager.

☐ Clerical and Intermediate Occupations
 Such as Secretary, Personal Assistant, Call Centre Agent, Clerical Worker, Nursery Nurse.

☐ Technical and Craft Occupations
 Such as Motor Mechanic, Plumber, Painter, Electrician, Gardener, Train Driver.

☐ Routine, Semi-Routine manual and Service Occupations
 Such as Postal Worker, Machine Operative, Security Guard, Caretaker, Farm Worker, Catering Assistant, Sales Assistant, HGV Driver, Cleaner, Porter, Packer, Labourer, Waiter or Waitress, Bar Staff.

☐ Long-Term unemployed
 Claimed Jobseeker's Allowance or earlier unemployment benefit for more than a year.

☐ Small Business Owners who Employed less than 25 people
 Such as Corner Shop owners, Small Plumbing Companies, Retail Shop owner, single Restaurant or Cafe owner, Taxi owner, Garage owner.

☐ Other
 Such as Retired, this question does not apply to me, I don't know.

☐ I prefer not to say
 Prefer not to provide a specific response to this question.

2. Type of school you attended for the most time between the ages of 11 and 16

☐ A state-run or state-funded school

☐ Independent or fee-paying school

☐ Independent or fee-paying school where 90% or more of tuition covered by bursary

☐ Attended school outside the UK

☐ I do not know

☐ I prefer not to say

3. Eligible for free school meals at any time (If you finished school after 1990)

☐ Yes

☐ No

☐ Not applicable (finished school before 1990 or went to school overseas)

☐ I do not know


☐ I prefer not to say

Save
Cancel

NOTE: The Save button will not be enabled until all 3 questions have been answered.

On saving the user is taken back to the My ESR dashboard and they will see a message to confirm that the data has been saved successfully.

My Socio-economic Background

The request has successfully completed 

[View Details !\[\]\(47a3b08df1ba32720cad69432dbd8375_img.jpg\)](#)

1. Occupation of your main household earner when you were aged about 14

Modern professional or Traditional professional

2. Type of school you attended for the most time between the ages of 11 and 16

A state-run or state-funded school

3. Eligible for free school meals at any time

Yes

[Update My Information](#)

4 National Workforce Dataset – 3.6 ESR Amendments

NHS England have made a submission to the Data Alliance Partnership Board (DAPB) requesting changes to value sets within the National Workforce Dataset. As a result of these requests being approved, the following changes to values within ESR have been made and are outlined below.

1. Job Role/ Staff Group

The following **Staff Group / Job Role** has been created:

Main Staff Group	Job Role	Capacity Code	Date From
Nursing and Midwifery Registered	Enhanced Practice Nurse (Primary Care only)	1	01-JAN-1951

The following **Staff Group / Job Role** has been renamed:

Main Staff Group	Old Job Role	New Job Role
Additional Clinical Services	Trainee Nursing Associate	Student Nursing Associate

Existing Positions with the 'old' value will have it replaced with the 'new' / 'renamed' one.

2. Area of Work

The following 2 Area of Work values have been created:

Area of Work (Pri/Sec/Ter)	Date From
Clinical Support Audiology and Hearing Services Audiology and Hearing Services Adult	01-JAN-1951
Clinical Support Audiology and Hearing Services Audiology and Hearing Services Paediatric	01-JAN-1951

The following 5 **Area of Work** values have been re-named:

Old Description (Pri/Sec/Ter)	New Description (Pri/Sec/Ter)	Change
Clinical Support Clinical Support Audiological Science	Clinical Support Audiology and Hearing Services Audiology and Hearing Services	Rename Secondary and Tertiary Values
Dental Oral Oral and Maxillofacial Surgery Oral and Maxillofacial Surgery	Dental Oral Oral and Maxillo-facial Surgery Oral and Maxillo-facial Surgery	Rename Secondary and Tertiary Values

Dental/Oral Oral and Maxillofacial Pathology Oral and Maxillofacial Pathology	Dental/Oral Oral and Maxillo-facial Pathology Oral and Maxillo-facial Pathology	Rename Secondary and Tertiary Values
Dental/Oral Dental and Maxillofacial Radiology Dental and Maxillofacial Radiology	Dental/Oral Dental and Maxillo-facial Radiology Dental and Maxillo-facial Radiology	Rename Secondary and Tertiary Values
Clinical Support Clinical Support Maxillofacial Prosthetics	Clinical Support Clinical Support Maxillo-facial Prosthetics	Rename Tertiary Values

3. Occupation Codes

The following **11 Occupation Codes** have been renamed:

Occupation Code	Old Occ Code Description	Occ Code Description
NHA	Trainee Nursing Associate in Adult and General	Student Nursing Associate in Adult and General
NHB	Trainee Nursing Associate in Children and Young People	Student Nursing Associate in Children and Young People
NHC	Trainee Nursing Associate in Maternity Services	Student Nursing Associate in Maternity Services
NHD	Trainee Nursing Associate in Community Mental Health	Student Nursing Associate in Community Mental Health
NHE	Trainee Nursing Associate in Other Mental Health	Student Nursing Associate in Other Mental Health
NHF	Trainee Nursing Associate in Community Learning Disabilities	Student Nursing Associate in Community Learning Disabilities
NHG	Trainee Nursing Associate in Other Learning Disabilities	Student Nursing Associate in Other Learning Disabilities
NHH	Trainee Nursing Associate in Community Services	Student Nursing Associate in Community Services
045	Dental and Maxillofacial Radiology	Dental and Maxillo-facial Radiology
046	Oral and Maxillofacial Pathology	Oral and Maxillo-facial Pathology
061	Oral and Maxillo-Facial Surgery	Oral and Maxillo-facial Surgery

The following **Occupation Code** has been closed:

Value	Description	To Date
S2D	S2D Scientist in Orthoptics	30-JUN-25

4. **Fixed Term / Temporary Contract Reason**

The following **Fixed Term / Temporary Contract Reason** has been renamed:

Old Description	New Description
Training Contract - LAS	Locum Appointment Service

The following **Fixed Term / Temporary Contract Reason** has been closed:

Value	To Date
Retirement Age	30-JUN-25

5. **Reporting**

The above changes have also been reflected in ESR BI and the DW.

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5 Change to the Congestion Charge NR NP NT NNI NHS element

The Congestion Charge NR NP NT NNI NHS element has been updated with a new input value of Silvertown and Blackwall Tunnel.

6 **HMRC Advisory Fuel Rates for 01-JUNE-2025**

HMRC has published new advisory fuel rates for company cars effective 01 June 2025 and these rates are now in use in ESR.

For one month from the date of change, employers may use either the previous or new current rates, as they choose. Employers may therefore make or require supplementary payments if they wish but are under no obligation to do either.

The revised rates are as follows:

Engine Size	Petrol	LPG
1400cc or less	*12p	*11p
1401cc to 2000cc	14p	*13p
Over 2000cc	22p	*21p

Engine Size	Diesel
1600cc or less	11p
1601cc to 2000cc	*13p
Over 2000cc	*17p

Engine Size	Electric
1400cc or less	*7p
Over 1400cc	*7p

* No change has been made to these rates. These are stated for information only.

Action

Please note that mileage payments are not processed when Retropay is run, so any changes to the amounts already paid will need to be made manually.

7 Update to Professional Bodies Interface for GMC

In preparation for Physician Associates and Anaesthesia Associates being included in the GMC Interface, a new role GMC – Other Prof Registrations has been created.

It is expected that the data relating to the Physician Associate and Anaesthesia Associate roles will be included in the GMC Interface to ESR from 31 December 2025. However, a user notice advising of the work, confirmed date and actions required from organisations will be provided in October 2025, with subsequent updates provided via user notice in the lead up to the December date.

8 Amendment to the Total Reward Statement (TRS)

Changes have been made to the Total Reward Statement to provide members with alternative pension scheme benefits if they are eligible under the McCloud remedy.

A new landing page is displayed for members who are eligible. It provides further information about the McCloud remedy and what the alternative benefits will look like. The page includes a Declaration section explaining that the member must confirm that they understand that they have two alternative sets of benefits and must select one at retirement, along with a tick-box which the member must complete to acknowledge that they have read and understood the Declaration.

After leaving the landing page McCloud eligible members will be presented with tabs to view their standard or alternative benefits. The earliest standard pension will be displayed by default. Both standard and alternative benefits are downloadable with the annual benefit statement.

Home

About

My Statement

Need Help?

Welcome back Mr TRS | [Logout](#)

Employee Statement

View Statement

Download/Print Statement

Remember to print or save a copy of your statement for your records, otherwise your statement will not be retained upon refresh.

More information

Where you see please click on it for more information. If you need more help please select Need Help? at the top of each page.

Did You Know...

As an NHS Employee you may be eligible to join the NHS Pension Scheme. If you are not already a member, why not visit the NHS Pension Scheme website to learn more. If you are already a member you can sign up to our NHS Pensions newsletter by e-mailing us your contact details or find us on Twitter @nhs_pensions.

Your Opinion Matters

Please spare us 2 minutes of your time to complete our anonymous survey

Total Reward Statement - Mr. TRS

Personal Details

Employer Benefits

NHS Pension

Option A - Standard Benefits

Option B - Alternative Benefits

2008 Section

1995 Section

2015 Scheme

Annual Benefit Statement 2008 Section

Membership Number

11999968

Date first joined NHS Pension Scheme

08/07/1977

Normal Pension Age

55 years

Pay

£126,643.00

Updated To

30/04/2010

Standard Benefits

Benefits	Projected Benefits at normal pension age
Pension	£61,273.37
Lump Sum	£151,848.00
Adult Dependant Pension	£27,722.76
Reckonable Membership	34 years, 21 days
Practitioner Earnings	£150,000.08

The current value of your NHS Pension Scheme benefits is there to provide an indication only. You are not able to claim these benefits until your normal pension age. Please note if you have membership in more than one part of the scheme you may have more than one normal pension age. If eligible you may be able to take these earlier but they would be reduced. They are only payable once the appropriate application has been made. Members can find further information about when NHS pension benefits can be payable from by viewing the NHS Pension Scheme Member Guides.

Standard Benefits if you take the maximum lump sum

Benefits	Projected Benefits at normal pension age
Pension	£47,524.73
Lump Sum	£316,831.69
Adult Dependant Pension	£27,722.76

At retirement you may be able to exchange some of your annual pension to provide a lump sum (larger lump sum as allowable under HMRC rules. (This is not applicable to NHS members who left NHS employment before 1 April 2008) For further information please visit the NHS TRS information website.

Standard Death Benefits

Lump Sum on Death at

30/04/2010

Lump Sum on Death

£137,865.08

In the event of your death the NHS Pension Scheme may provide a lump sum and / or pension benefits to your spouse, civil partner or qualifying nominated partner. The amount will depend on the circumstances at the time of your death and whether you are a contributing member or a former member of the NHS Pension Scheme. The information shows the current value of these benefits. Please note that a lump sum may not be payable following death in retirement. For more information please visit the NHS TRS information website.

Death Benefit Nominations

Type of Nomination

No nomination recorded

If you have already made a nomination or election the details we currently hold are shown above. If you are married or in a civil partnership and want your death benefits to be paid to your spouse or partner then you do not need to make a nomination. If you have a non-legal partner and want to ensure that they receive your lump sum on death benefit you should complete a death benefit nomination form.

If you have not yet made a nomination and wish to do so, or, wish to change an existing nomination please visit the Nominations section of the NHS Pension Scheme website.

NHS Pension Contributions for the year ending 30/04/2010

These figures are the contributions that you and your employer have paid toward your NHS Pension.

Employee annual contributions	£897.06
Employer annual contributions	£1,477.50
Employee annual added years contributions	£369.38

Address

220 Broadway
Fleethwood
Lancashire
UK
FY7 8LG

Statement Disclaimer

This is an estimate and shown for guidance only. You should check the amount of Reckonable Pay quoted is consistent with your current pay or what would be the full time equivalent pay if you currently work part time. If the figure is significantly different you should contact your employer. If you are a practitioner you should also check your dynamising sheet to ensure the figures reflect the pay information you have provided. Figures are based on known information. Exact retirement figures cannot be given until final pay and service details are known.

If you have purchased or are purchasing additional pension this has not been included in your statement.

If you have a scheme pays election this has not been considered in the pension benefits shown.

For further information please visit the TRS information website.

For further information visit <http://www.nhs.uk/total-reward-statements>

Customer Education

PUBLIC