

Workforce Systems Newsletter



April 2026



Hello April

- A good day isn't always
- Perfect. It challenges you to
- Release your potential and
- Inspires you to appreciate the
- Little, amazing things in life

OurMindfulLife.com

We are caring
one team
listening to understand
open and honest
always improving
inclusive

Contacting the Workforce Team

Please use uhd.workforcehelp@nhs.net email for roster and general workforce queries or call 5552.



Don't forget

Reminders



Finalisations

Finalisation deadline for duties and unavailabilities in March is 3.00 pm on Thursday 2 April.

Please ensure that **ALL** shifts, including cancelled ones are finalised.

Any roster not finalised on time, **will** be removed from the submitted payroll file; if this happens staff will not be paid any enhancements or overtime.

Payroll Cut Off – All staff

Payroll changes must be submitted by **Tuesday 7 April**, this relates to contractual information.

All payroll changes **MUST** be submitted to the workforce team by the payroll deadline of the corresponding month, e.g. February terminations/hours changes/eforms need to be with workforce by **Tuesday 7 April**.

Access to ESR

If you have a member of staff who is leaving the trust, please ensure that they can log into their ESR account to access the Leaver Dashboard. The leaver dashboard is open for 2 months from termination date. This is where they can find their P45 when it is issued.

Changes to contractual hours

If there has been a change to a staff members contractual hours, please ensure that all future annual leave is reviewed and updated accordingly to ensure that correct number of leave hours are used.

Staff leaving the trust

Please ensure that you have access to ESR in order that you are able to access your P45, most recent P60 and the last 12 months of payslips.



Tip of the month – Annual Leave



Booking annual leave that crosses 2 annual leave years

The annual leave year within the organisation runs from 1 April until 31 March. When booking annual leave that covers the end of the current leave year and the beginning of the next leave year you MUST enter this as 2 separate leave requests.

1 to cover the time up to and including 31 March and 1 to cover 1 April onwards. If it is not entered in this way, it can cause problems with your leave entitlement.

On the roster, it should look like the example below, the image below shows the leave including the bank holiday on 3 April.

	March 2026	April 2026
Unfilled Duties >	30	31
e-Roster 2 - Non Clinical (Trg) v	30 March 2026	01 02 03
TRAINER TEAM		
A&C Benjamin, Regan (PP) (Band 6 A&C)	A/L	A/L A/L BH

Booking Bank Holiday Leave

For staff who do not work bank holidays, it is essential that you record it correctly as Bank Holiday.

Group *
Annual Leave

Reason *
A/L BH - Annual Leave Bank Hol

If a member of staff has requested the bank holiday as part of their leave week, e.g. 6 – 10 April, you need to amend this as follows:

- Bank Holiday Leave - 6 April
- Annual Leave - 7 to 10 April

As an approver of annual leave, always check that the hours on the leave request equates to the same hours that the person would work on that day.



Tip of the month – Annual Leave



Annual Leave Approval

ALL staff should be requesting their annual leave via Loop; this ensures fairness and ease for managers when it comes to approving.

For staff who approve annual leave, it is **your** responsibility to ensure that the leave hours are correct.

If a member of staff has a work pattern that does not correspond to a standard 7.5 hour per day, e.g. they may work 8 hrs 20 mins on a specific day, you need to ensure that the leave is correct.

You can check the hours either via the Personal Pattern, or, if the shifts are still showing on the roster, check the hours for each day and adjust the leave hours accordingly.

If you have any problems, or need additional support, please contact uhd.erostertraining@nhs.net

What to do if you have used more than your entitlement.

If you have used more leave than your entitlement, you have 2 options:

- Work those hours back
- Pay back the hours your have overtaken

The workforce team are monitoring staff who have overtaken annual leave and will be contacting departments to get the balance back to zero.

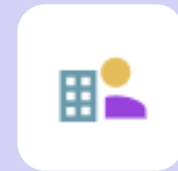
If you have no future leave, workforce will need to deduct from your salary, or you would need to make up the hours and notify us so we can adjust the record.





Workforce Information

Break Glass Agency User Guide



The Break-Glass Agency Request eform is now available on the eforms portal.

This has been developed to ensure appropriate governance and checks are in place to scrutinise and challenge the use of agency staff within the trust, particularly where it does not comply with [agency rules](#). The agency rules include a 'Break Glass' provision to ensure patient safety.

The [user guide](#) on how to complete the form is available on the Workforce SharePoint site.

Staff moving to a new role within UHD



If you have a member of staff who is moving to a new role within the trust, please **DO NOT** submit a termination via ESR MSS. This will terminate the contract they have with UHD.

If a member of staff has been recruited to a new position, recruitment will update ESR and then this will be loaded into the roster system the following day.

Socio-economic information on ESR

A new set of questions have been introduced to ESR to enable the recording of socio-economic background data for staff, the ability to record and report on the information will support government policy.

The information can be updated from your Dashboard page. For full information, please have a look at the [reference guide](#) which is available on the Workforce SharePoint site.



Updates from the trainer

- Do you or a member of your team need access to the rostering system? Please complete the [training checklist form](#).
- Do you need a change in your access level? Please ask your manager needs to complete the [Changes to current access form](#).

New course dates are frequently added to the Workforce SharePoint site as well as the dates when the [roster trainer is on site](#). If you wish to book some time with the roster trainer, please check the available dates using the link above and email uhd.erostertraining@nhs.net with your preferred date and time.

Roster training



There is a new eLearning module for staff who already have access to the manager side of the rostering system; [Allocate Optima eLearning – extras](#)

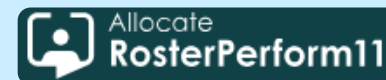
To find out what each of the eLearning modules cover, please have a look at the [eLearning Synopsis document](#).

Refresher training

In the near future all staff who have **manager level profile** on the rostering system will be required to complete an assessment which will be marked by the workforce trainer. If you do not successfully complete the assessment, your access to the system may be reviewed and reduced and you will need to complete refresher training with the workforce trainer or complete the Optima System Navigation and Standard eLearning modules and the associated assessment.

Contacting the workforce trainer: please use uhd.erostertraining@nhs.net email.

RosterPerform



Did you know you can use RosterPerform to view annual leave percentages within specific date ranges? This enables you can check the leave percentages before approval for rosters with future dates.

Log into RosterPerform and use the filters to choose your date range, eg 01/11/2026 to 05/12/2026. In the **Select Period Type**, ensure you have chosen **Whole Period**.



Information from the trainer

TOIL and how to record it



If a member of staff works over their contracted hours this must be recorded on the roster.

For example, the person normally works from 8am until 4pm, but due to a meeting that has over-run, they do not finish until 4.45pm – the times on their shift for that day needs to be adjusted, if required a note can also be added.

This means that they can then take this time back later (*within 2 roster periods*) as TOIL. TOIL can be requested via Loop or as commonly happens, can be added directly to the roster by the person's manager.

TOIL is always recorded with a zero value in the Work Time; as the person is taking time back that they have already worked.

In some areas, managers are adjusting the end time of the shift to show that the person has left early or come to work later than normal – there is nothing wrong with this **BUT**, if you look back at the roster in a few months and see this change of start or finish time, will you remember why it was changed?

The recommendation is that if someone is taking back time they have already worked, it is added to the roster as a TOIL unavailability.

KIT Days and how to record them

Some staff come back to work on KIT (*Keep in Touch*) days before the end of their parenting leave. To record KIT days, please do the following:

- Assign the KIT day unavailability to the person for the correct day.
- Ensure the work hours are zero.



Arranging payment for a KIT day

If a person has completed several KIT days in one month, submit an SR3 form with all the dates listed. If the person has completed KIT days that are in different months, a separate SR3 form needs to be completed for each month. **Do not** submit an SR3 form which has dates for multiple months on it – it will be rejected and may delay payment.

KIT days are processed a month in arrears so any SR3 form submitted in March will be paid in April.

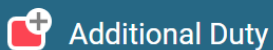


Information from the trainer

Bank, Additional and cancellation reasons on the roster

These reasons have recently been reviewed and updated, for the full guide on what is available have a look at the [guide here](#).

Additional Duties



There are still a high number of additional duties being created on the rosters.

Some of these are being created legitimately, however, before creating additional duties, senior managers or matrons should be checking to see if there are unfilled duties which could be moved.

If the only available shifts have been sent to bank and are unfilled, **right click on the shift** and **select Reset to Unit Fulfilment option**, once it has been reset, **right click** and **select [Move Demand](#)**

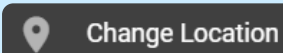
Remember – any additional duty you create, and use is not within your template and will cost money.

Finalisation



For bank shifts, finalisation should happen as soon as possible after the shift has been worked. For substantive shifts, these should be finalised once a week – this ensures that the information is current and up to date and means that you do not have a lot to finalise when it comes to the roster finalisation deadline.

Adding locations to shifts



A considerable number of staff now work cross site or have working from home days.

If a person is working from home, please change the location rather than using the HW Unavailability.

You can add a location to a shift on the roster to indicate where the person is working. For full information, please refer to the guide [here](#).



Loop information



Loop account issues

Before contacting either the Workforce team or the Roster trainer about Loop issues, please do the following:

- ***Cannot see anything when you sign into Loop; sign out of Loop completely and then sign back in.***
- ***Ensure you have you created a Loop account.***
- ***Sign in with the correct email address and password.***
- ***Ensure you are connected to the organisation.***

Change to Loop Login

From 30 January, if you have forgotten your Loop password and have signed up to Loop with your UHD email address, the email allowing you to reset your Loop password will no longer be forwarded to your NHS.net email address – please contact either uhd.workforcehelp@nhs.net or uhd.erostertraining@nhs.net and someone can log a call with Allocate for you – we cannot unlink accounts or reset Loop password.

Loop Newsfeed

The Loop newsfeed has become an increasingly popular way to provide information to staff.

When you log into Loop, please check through the newsfeed articles to see if any of the information relates to your job. Some of the recent information on the newsfeed has included:

- ***Department moves***
- ***Training updates***
- ***Bank staff updates and information***



Other General Information

Bank Duties

There have been several instances where bank shifts are being sent to bank **after** the date of the shift, the person has already worked the shift and then it has been sent to bank.

Bank shifts should be approved and assigned to the person who will be working the shift **BEFORE** it is worked, not after.

Bank postings

When you initially start with a bank posting, there are often restrictions assigned to you until the temporary staffing team are able to verify your mandatory training.

You may find that you are unable to book bank shifts even on your main ward.

If this happens, please contact the temporary staffing team to review these unit restrictions.

Contacting the workforce team or the workforce trainer

If you require assistance with ESR or Loop, please ensure that you supply your assignment number, this enables the team to find you quickly as we have some staff in the origination with the same or similar names.

Roster issues

If you have issues with your roster, please include the roster code and name in the email. All rosters have this type of information. An example of the roster/unit name is:

AMU-G (BmthUHD) 10380

If the query is relating to a specific person, please also include their assignment number

The Workforce team would like to wish everyone a Happy Easter.



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