Workforce Newsletter

University Hospitals Dorset
NHS Foundation Trust



Contacting us…

- Please use uhd.workforcehelp@nhs.net email for roster and general workforce queries or call 5552.
- For roster training, general roster support or AHP job planning, please email uhd.erostertraining@nhs.net.
- Please use uhd.medicalrosteringhelp@nhs.net for medical rostering queries.
- For Job Planning queries (medical staff), please use uhd.job.planning@nhs.net.

All ESR and HealthRoster password resets MUST be logged through the UHD and IT self-service portal

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



Reminders



Finalisations

Finalisation deadline for duties and unavailabilities in October is 12.00 on Wednesday 4 November.

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 **Thursday 5 November**, 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. October terminations/hours changes/eforms need to be with workforce by **Thursday 5 November**.

Contacting the workforce team

Please ensure that you supply your full name and assignment number.

Failure to do this can lead to delays in your query being dealt with

Christmas Pay



Staff will be paid on Wednesday 23 December.

Christmas roster finalisation

Roster finalisation for December shifts will be 2.00 pm on Tuesday 5 January.

If you have staff working bank over the Christmas period, please ensure that you finalise their shifts in plenty time to ensure payment.

Workforce Information

Annual Leave – use it or lose it!!!

This is a reminder for colleagues to take regular annual leave throughout the year to support wellbeing and ensure full entitlement is used by **31 March 2027**.

Please plan and agree any remaining leave for this leave year with your line manager. Leave carry over is only granted in specific circumstances, please refer to the Annual Leave policy for full details.

Quick reminders….

- **ESR Supervisors** – if you require a hierarchy change, please email the workforce team to update this for you.
- **Moving to a new role** – if staff are moving to a new role, **DO NOT** submit a termination on ESR as this will terminate their UHD contact. Internal moves will be actioned by recruitment.

  Managers, please remove any duties that have been assigned to the person. Failure to do this means that the person cannot be assigned duties in their new department. If you are unsure how to do this, please contact the workforce trainer (uhd.erostertraining@nhs.net) who can guide you through the process.
- **Payment progression meetings** – it is essential that these are recorded on ESR at the same time as recording the staff member's appraisal.
- **Sickness on bank holidays** – if staff are sick on a bank holiday, the bank holiday entitlement is removed from the leave entitlement.
- **Annual leave entitlement (2026/2027)** – remember that this contains the Easter 2027 entitlement, please make sure this this is booked out on the roster.
- **TOIL and KIT days** – these should always be recorded with ZERO work hours.

Workforce Information

ESR Manager Self Service – Terminations and flexible working requests

Some areas that require careful attention when processing ESR Transactions

Termination Reasons

Please avoid selecting **"Voluntary Resignation - Other/Not Known"** unless no other option is appropriate. This reason provides limited reporting information and impacts workforce analysis. If it must be used, please include a clear explanation in the **Comments** field.

Terminations submitted without sufficient supporting information will be returned for amendment before processing.

Destination on Leaving

Whilst not currently a mandatory field, managers should now complete the **Destination on Leaving** field as part of the termination process wherever this information is known. Where an employee is moving to another NHS organisation, the **NHS Organisation** field should also be completed.

Why - This information supports more accurate workforce reporting and helps us better understand staff movement across the NHS.

Flexible working requests

The workforce team have received queries about flexible working requests.

Please remember that approving a flexible working request DOES NOT automatically update and employee's contractual hours in ESR.

Where a change of hours has been agreed, and ESR Manager Self-Service hours change must also be submitted to ensure the employee's ESR record is updated correctly.



Useful tips…

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 and corresponds to the same number of hours that the person would normally work.

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**

Leave requested via Loop but has the wrong hours

When checking the leave, please do not reject the leave request if it has incorrect hours. Unless someone is requesting a partial day, **Loop** automatically calculates the leave hours and sometimes this can be incorrect.

Leave should only be rejected for operational reasons where it is not appropriate for the person to be on leave, e.g. already have several staff on leave.

ESR Self Service



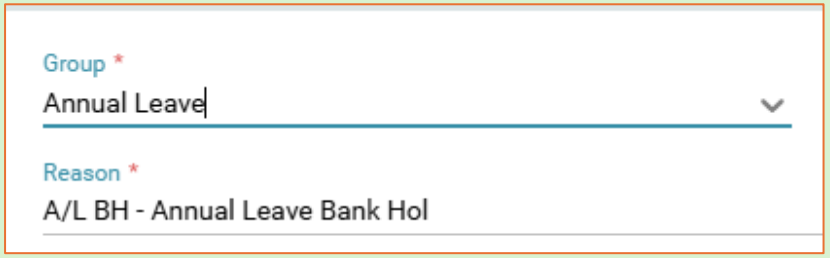
If you are leaving the organisation, going on maternity leave or having another planned long-term leave such as a career break, please ensure that you have set up the Multi Factor Authorisation and internet access for your ESR self service account.

Have a look on the Workforce Systems SharePoint site for the document which gives instructions on setting this up; ESR - MFA in ESR User Guide

Bank Holiday Leave

Booking Bank Holiday Leave

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



If the person normally works on the day when the bank holiday occurs, it must be recorded as A/L BH.

If the person does not normally work on the day when a bank holiday occurs, they should be assigned a DO shift or the roster should be left blank.

If a member of staff has requested the bank holiday as part of their leave week, e.g. 21 – 27 December, you need to amend this as follows:

- Annual Leave – 21 to 24 December
- Bank Holiday Leave – 25 December

As the Boxing Day bank holiday falls on Monday 28 December, this day needs to be marked as A/L BH.

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.

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.

Roster training



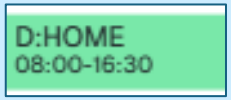
The short training sessions/webinars recommenced in September. They are not currently being well attended. Sessions have been booked in until the end of January 2027. Please have a look at the following link to see what is available. **Drop-In sessions & Optima Webinars**

Working day unavailabilities

A lot of areas have staff who work from home during the week. Rather than using the unavailability of HW, you should assign the shift to the person as normal and then use the **Change Location** option.



The shift will show like this image on the roster.



On Loop, the person will also be able to see the location assigned to the shift.

Refresher training – Baseline Assessment

Some staff who have received and completed the baseline roster assessment have been concerned as they have not passed.

The assessment is to give the workforce trainer guidance on whether you require some type of refresher training, it does not assume that you are unable to manage your roster(s).

If you are sent the eLearning to complete, please carefully work through the eLearning module as it contains all the information required to complete the final assessment.

Information from the trainer

Change of hours and personal patterns

If a person has a change of hours, and they have a current personal pattern, the pattern will not automatically update.

Process:

Clear the duties from the roster *(for that person)* from the date the new hours/pattern is going to be effective from, update the pattern, save the changes and then re-run the auto roster to lay down the updated pattern.

If this is something you need help with, please contact the workforce trainer who will be able to provide support.

What happens if previous roster hours are incorrect?

If the change in hours took place a while ago and the person's hours on the roster have been incorrect for a while, please contact the workforce help team or the workforce trainer. They will be able to unlock and update previously worked shifts.

Any annual leave that the person had booked and taken since the change in hours, may also need to be corrected.

Rostering skills

Most of the skills on the roster system are for clinical staff to ensure patient safety.

It is the responsibility of the unit lead or other designated person to ensure that all relevant skills are assigned to staff.

Some areas have designated housekeeping and/or portering staff. These staff need to have the appropriate skill assigned to them (Assigning and Viewing skills.pdf), this document is only available from a trust computer.

Failure to assign the correct skills to staff can result in warnings on your roster – orange shifts.

Sending shifts to bank

If you are sending a shift to bank and it is for a porter or housekeeper, please make sure you add the appropriate skill in the Temporary Staffing Skills area. All portering, catering and housekeeping staff sit under the Estates staff group.



Loop information

Loop account issues

Before contacting the Workforce team, the workforce trainer, or the temporary staffing team about Loop issues, please try the following first:

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

Loop Troubleshooting

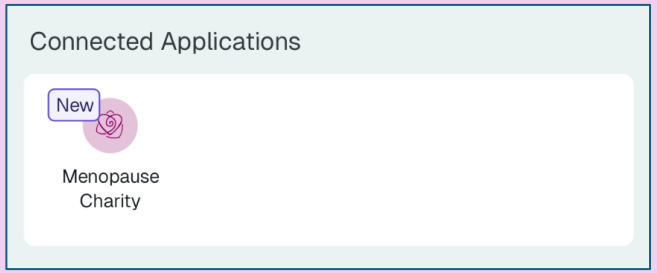
There is a new troubleshooting guide on the Workforce SharePoint site, if you are unable to access the Intranet, and would like a copy of the guide, please email uhd.erostertraining@nhs.net

Booking bank shifts

Where possible, staff should be using the Loop app or Loop web to book their bank shifts. You should only be contacting the temporary staffing team to book your bank shift(s) if there are issues doing this via Loop.

New Menopause Charity Tool

This allows users to access trusted information, guidance and practical resources on menopause and menopause related symptoms.



Other Information

Joiners and Leavers in the Workforce team



Tom Behan; Tom joined us in September in the workforce improvement team. He's a local lad who attended Bournemouth University and has worked in the diabetes centre in Bournemouth before joining us.

The main workforce improvement projects we are working on is EHR data so updating positions and assignments, getting everything ready for when that is introduced.

Tom is also working on updating a job planning tool as well as implementing automation to processes wherever it can be put in.



Ellena Harvey; Ellena left us at the beginning of September to move to work with the transformation team and we all hope she is settling in well.

Clair Hayward; Clair is currently working with the medical staffing team and will be leaving us shortly to work with the new HealthSet team. We wish her all the very best in her new job.