



Workforce Systems Newsletter

Monthly Reminders



Finalisations



All shifts and unavailabilities for **June** **MUST** be finalised by **12.00** on **Friday 3 July** to enable the workforce operational team to submit the information to payroll.

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

Any roster not finalised on time, will 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 **Monday 6 July**, 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. April terminations/ hours changes/ eforms need to be with workforce by **Monday 6 July**.

Leavers and Movers

On the UHD and IT self-service portal there is an option to remove IT access for clinical and non-clinical applications for staff who are moving department or leaving the organisation.

Please note: this is *not* the same as updating information in ESR MSS.

UHD Leavers and Movers form



UHD Leavers and Movers form

Use this form to remove IT access to all clinical and non-clinical applications for UHD staff that are changing role or leaving the Trust.

Quick notes and reminders....

- ✓ When emailing the workforce team or the workforce trainer, please make sure you include employee staff numbers.
- ✓ If a person is moving to a new post, please remove any shifts/duties that have been assigned to them after the date they leave your department.
- ✓ All password resets for ESR and HealthRoster **must** be requested via the UHD and IT self-service portal, this also applies if you have locked yourself out of your account.
- ✓ If staff are moving to a new role in the trust, **do not** submit a termination on ESR as this will terminate their UHD contract. Internal moves will be actioned by Recruitment.
- ✓ If a person is moving department or leaving the organisation, ensure that any accrued TOIL is taken before they move or leave.



Tip of the Month



Zero Hours Unavailabilities

On the Optima system we have a couple of zero hours unavailabilities that are frequently added incorrectly.

1. TOIL

The workforce team and workforce trainer are now actively reviewing TOIL episodes that have been added to rosters.

TOIL is an unavailability to show the person is using hours that they have previously accrued by working over their normal contracted hours. As such, it should ALWAYS have zero work hours assigned - please do not change this.

You can add a note to the TOIL unavailability if required describing when the additional hours were worked.

TOIL episodes have been corrected for January to June 2026, however, this may now mean that the person is showing on your roster as owing hours.

In order to take TOIL, the person must have accrued extra time, this is reflected on the roster by adjusting the work times to show the correct start, end and break time the person had, and at present, if the person has accrued TOIL, you will see a negative number in the Hrs Left column on the roster.

Any TOIL accrued should be used within 3 months and must be used up before either moving department or leaving the organisation.

2. KIT Days

KIT (Keep In Touch) days are another unavailability that should be added with zero work hours assigned.

The KIT day is added to the roster and then once the person has completed their KIT days for that calendar month, an SR3 form is submitted to arrange for payment.

Please do not submit an SR3 form for KIT days that have been worked in different months - this will be rejected and may delay payment to the

Hierarchy changes in ESR

If you are requesting a hierarchy change in ESR please supply the cost code. If only a few staff need to be moved the assignment numbers of the staff are also required.

Bank Holidays

For staff who normally work on a day when a bank holiday falls, please record this as A/L BH for 1 day only, if the person is off for the whole week, there should be 2 leave unavailabilities, 1 for A/L BH and 1 for A/L.



Any staff who were off sick over April and May bank holidays have now had that bank holiday entitlement deducted as per policy.



Contacting the Workforce Team

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

Recording bank holidays on the roster

When a bank holiday occurs, the staff who would normally work on that day **MUST** have this entered as **Annual Leave Bank Holiday** with their correct number of working hours for that day.

If a person **does not** normally work on the day where there is a bank holiday, this can be indicated by a **DO** shift/unavailability or leave a blank space on the roster (no shift assigned).

If the person is doing an **on-call shift on a bank holiday**, this should be recorded as an **OC BH** unavailability for the bank holiday date, the work hours should correspond with the number of hours the person would normally work on that day.

ESR Manager Self Service eLearning

The new ESR MSS eLearning is now available on the Workforce Systems SharePoint site. Over the next few months, if you have had your access for 2 years or more, you will be contacted to redo the training, this is to ensure that you are up to date with any changes to the system as well as changes to policy and processes.

The workforce team will be sending out an audit assessment during July/August, please ensure that you complete the assessment by the specified completion date - this will be on the email that you receive.

Net Hours on rosters

As part of the larger workforce plan the team will be looking more into the net hours on the rosters. The team will be contacting departments to arrange meetings to discuss your roster and the net hours.

Hours on the roster (assigned hours, hrs left, net hrs left). Do you have an opinion on how this is displayed, if so, please complete the form below, this poll will be active until the end of July after which time it will be closed.

[Roster Hours View](#)



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.***

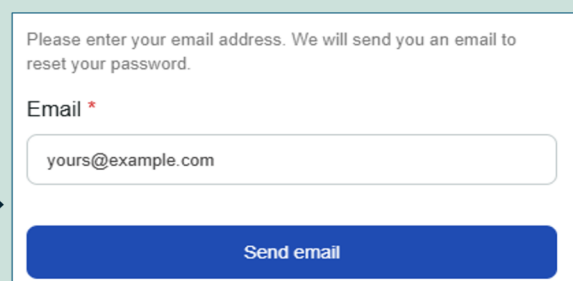
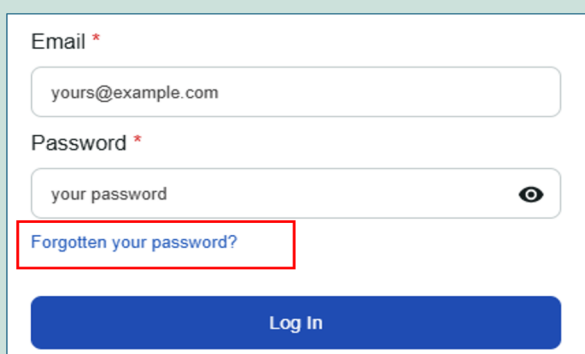
There are no further major updates to Loop at present, however, there are frequent small updates to the application both the web version and the mobile app.

Please ensure that you update the app when prompted and once you have updated, **if you can no longer see your calendar, log out of Loop completely and then log back in.**

If you cannot remember your password for Loop, **please do not contact the workforce team, the workforce trainer or the temporary staffing team - we are unable to reset Loop passwords.**

Reset your Loop password

- Click **Log In**.
- Click the link **Forgotten your password?**
- Enter your **email address** - the one you signed up to Loop with
- If the email address is correct, you will receive an automated email with a link to allow you to reset your Loop password.



Record your availability

If you have a bank posting, you can record your availability using Loop, go to the main menu and click Record Availability, you can then choose the date(s) and times you wish to be 'available' for bank duties.

Updates from the trainer



HealthRoster Access

Do you or a member of your team need access to the rostering system? If so, please complete the [training checklist form](#). Do you need a change in your access level? If so, please complete the [Changes to current access form](#).

If you or a member of your team no longer need manager access to the rostering system, please email uhd.erostertraining@nhs.net

All staff with manager level (Roster Admin and above) access to the system are able to see the access level

Roster support

All staff with manager access to the rostering system are encouraged to contact the workforce trainer to request additional support when using the system.

If this is something that you would like, please contact uhd.erostertraining@nhs.uk and the trainer will be happy to arrange some time with you, this can either be on site or via teams.

Short training sessions/webinars

Later in the year the trainer workforce trainer is planning to deliver some short training sessions/webinars for staff who use the Optima (HealthRoster) system. The form includes a range of proposed session topics.

Each session will be no longer than 30 minutes. If this is something you would be interested in, please complete the [form](#).

At present there have been very few replies to this,

so this is your chance vote for any new short training sessions.

Changes to Optima Training

From August there will only be 1 course of each type per month and the Optima L2 course is being withdrawn and will now only be available on request.

The eLearning options for System Navigation, Optima Standard and Optima Extra's are available on the Workforce Systems SharePoint site.

Before completing the Standard eLearning, please speak with your manager to make sure you will be required to use the manager side of the roster. Once you have done this, please complete the training checklist for the trainer to review as alternate training options may be better. If you have difficulties with group or eLearning, please note this on the checklist form and the trainer can then arrange a 1:1 session with you.

Refresher training

If you have retired and returned, left the organisation and then returned or your user account has been suspended due to inactivity (not used for 6 months or more), and you require your access level to be reinstated, you will need to complete refresher training.

Please contact the workforce trainer for further information.



Alternate Access

Some staff have alternate access profiles to allow them to undertake financially based tasks such as approving bank shifts or adding overtime.

If you require an alternate access to complete these type of tasks the [Request for an Alternate Access profile](#) form needs to be completed by the person's manager.

Refresher Assessment

You may have been contacted during May or June to complete an Optima Refresher Assessment.

Please endeavour to complete the assessment the by date that was specified on the email sent to you, if you are unable to complete it by the requested date, contact the workforce trainer.

Some of you may be wondering why you have been requested to do this as you have been using the rostering system for a long time.

The reason for this is to ensure that you are up to date with the current best practice and day to day knowledge and skills that are required for using the rostering system as a lot of staff were given only basic training when they were given access to the system.

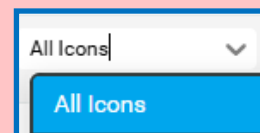
Medical Staffing

Please note that **with effect from 1 June 2026**, any increases or decreases in **Programmed Activities (PAs)** for **Consultants and SAS Doctors** must be supported by a **fully signed off Job Plan**.

The fully signed off Job Plan **must be attached to the SR3 form at the point of submission**. Any SR3 submitted without a fully signed-off Job Plan will be **rejected**.

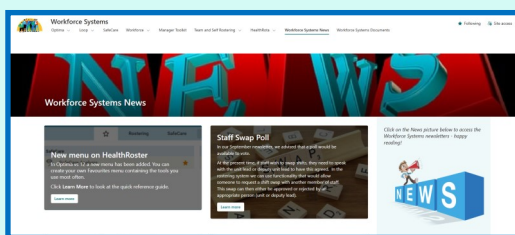
Roster Icons

Do you know what the different icons on the roster indicate and that you can filter your roster by the different icons.



[Roster Icons](#)

Workforce News Page



The Workforce Systems SharePoint site has a News page that has information from current or past newsletters that you may have missed.

All previous newsletters can be found on the Workforce Systems SharePoint site or the Intranet.

People Moves SharePoint & Transforming Care Together

The trust have a People Moves SharePoint site which is updated with information relating to various topics relating to the transformation and the moves taking place within the trust.

Click [here](#) to have a look.



Missed the briefings, catch up with them [here](#).

The Band 2-4 and Career Development team are running the monthly HealthCare Support Worker Forum meetings.

To join the meetings, please scan the QR code on the image.

Upcoming meetings are on the following dates and times:

- 7th July 1-2pm
- 18th August 1-2pm
- 22nd September 1-2pm
- 20th October 1-2pm

Healthcare Support Worker Forum

Join the conversation!



Connect | Share | Grow

Join us for an interactive session with guest speakers presenting on fundamentals of care and up to date topics.

This forum is dedicated to:

- Supporting HCSWs with educational training essential to their roles
- Promoting career development opportunities
- Providing a safe space to speak up and navigate challenges

HCSW Forums run monthly - upcoming forum dates and times will be sent out via screensavers and the staff bulletin .

Connect + Share + Grow
Your Online Support Forum Awaits!

HCSW Forum

Open space for HCSW to connect and share experiences



Join the forum via the
QR Code

