



Workforce Systems Newsletter

Monthly Reminders



Finalisations



All shifts and unavailabilities for **May** **MUST** be finalised by **12.00** on **Thursday 4 June** 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 **Friday 5 June**, this relates to contractual information.

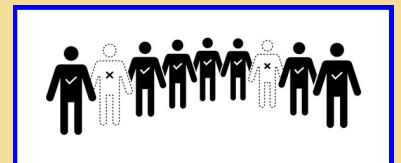
All payroll changes **MUST** be submitted to the workforce team by the payroll deadline of the corresponding month, e.g. April terminations/ hours changes/eforms need to be with workforce by **Friday 5 June**.

Absences on ESR

Only add absences such as sickness or annual leave to the **roster**.

Do not add to ESR **UNLESS** it is for a leaver and they have **unpaid leave**, this must be added to ESR for the current month in which the person is leaving.

If you are unsure, please contact the workforce team for support or advice.



Quick notes and reminders....

- ✓ 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, please **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, please make sure that any TOIL is taken before they move or leave.
- ✓ 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. Failure to do this causes issues for the new department as they are unable to assign any shifts/duties to the person.



Tip of the Month



Adding sickness to the roster

The format of the sickness reasons on Optima has changed to show the actual sickness codes that correspond to the sickness reasons in ESR.

When adding sickness, please ensure that you complete **all** mandatory fields and **update the certification field**.

Sickness episodes up to 7 days should be marked as Self Certified, sickness episodes over 7 days should be medically certified and sickness where they are neither self certified or medically certified should show as not certified.

Sickness should **ALWAYS** be marked as Open Ended until the person returns to work, this stops additional sickness episodes being added accidentally and it is easier to edit and update.

If a fit note is received, remove the Open Ended option, update the end date and then click Open Ended again.

If staff are on either HealthRoster or HealthRota, sickness should be added there, DO NOT add sickness to both the roster and ESR.

Managing Absence - Medical Staff

Do not add absences to HealthRota and ESR as it causes the payroll files to fail. If the person needs to be 'returned to work' on ESR prior to the payroll file run, please contact uhd.medicalrostering.help@nhs.net who will be able to help you.

Seeing the workforce team on site

There is normally a member of the workforce team at Poole and Bournemouth site each weekday for smartcard and Loop support. Please **do not** go to see the workforce team on site unless you have an appointment as you may be asked to book an appointment and come back another day.

Poole

If you have an appointment relating to Loop or Smartcards, please go to the Education Centre, 1st floor and use the phone on the wall to call the number which will be on the wall in front of you.

Bournemouth

If your appointment is at Bournemouth, please go to the Bungalow and call the workforce number which will be in the main reception area, there is a phone on the wall in the reception area.

To book an appointment to see a member of the team, please phone ext 5552 or email uhd.workforcehelp@nhs.net.

If you wish to see the workforce trainer, please email uhd.erostrertraining@nhs.net



Medical Staffing

Important Update: Job Plan and SR3 Requirements – Effective 1 June

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**.

To avoid delays, please also ensure the following:

- The **effective dates** on the Job Plan and SR3 must **match** and accurately reflect the requested change. For example, a Job Plan dated **1 April 2026** will only apply to an SR3 dated **1 April 2026** and will affect pay **from that date onward**. It cannot be used to support backdated payments prior to this date.
- Any requests for **backdated payment** must be supported by a **fully signed-off Job Plan** covering the relevant period.
- The SR3 must match the information held on **ESR** and should not include alternative or “known by” names.
- The PA value entered on the SR3 must match the value generated within the Job Plan, be **rounded to two decimal places**, and must be amended where there is a difference of **0.01 PA or more**.

A **minimum notice period of 13 weeks** is required for all Job Plan changes to allow appropriate planning and implementation of activity changes (e.g. clinic amendments).

Please be aware that all attached Job Plans will be reviewed and may generate queries that must be resolved before SR3 approval. Prompt responses to any queries will help avoid delays to payment.

If you would like to discuss any aspect of this process before submitting an SR3, please contact uhd.medicalrostering.help@nhs.net, and a member of the team will be happy to assist.

Please feel free to cascade this to any staff who you think may need to be made aware of this change.



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.

Late Payments

If items such as enhancements, overtime or on call information have been missed and need to be added to the Late Payment file, please contact the workforce team and they will send you the link to the Late Payment Request form.



There have been number of occasions recently where the form has been completed incorrectly.

The following information needs to be completed:

- **Employee information:** Name, assignment number, roster name and the cost code.
- **What you are requesting:** Overtime/Add Hours, On Call/Call Out, Enhancement.
- **Date(s) that needs amending:** If **No** is selected, you can only enter the details of **one** date, if **Yes** is selected you have the option to add **multiple** dates to be amended (*up to 15*).
- **What needs amending:** Date(s) and what the amendment covers, start or end times, total time to pay etc.
- **Confirmation:** Your name, when this is completed you are indicating that all request information is correct.

If the information is not added correctly this may delay payment.

loop

Loop Information

loop

Loop account issues

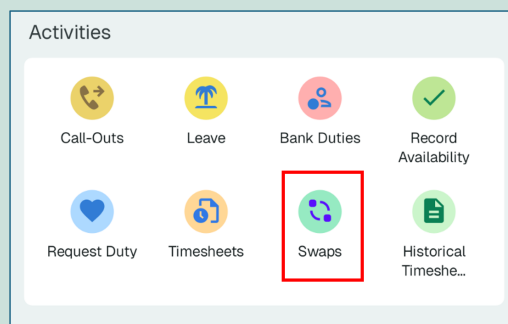
Before contacting either the Workforce team or the Roster trainer about Loop issues, please do the following:

- **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.**

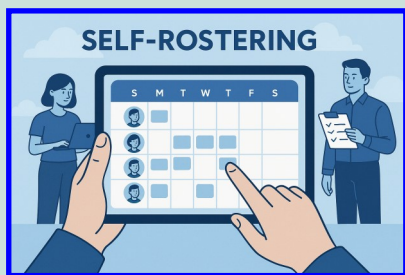
There are no further updates to Loop at present, however, there are frequent small updates to the mobile app. Please ensure that you update the app when prompted and once you have updated, if you can no longer see your calendar, log out of Loop completely and then log back in.

You may notice that on the Activities area of the menu (Loop App), there is a new icon, Swaps. This can only be used by areas who have the swaps facility set up on their roster. This allows staff to request shift swaps with other team members and then, if the swap is agreed, the manager can approve the swap.

If this is something you are interested in trialling in your area, please complete the [Shift Swap](#) form.



Self Rostering using Loop



Some areas of the organisation use self-rostering, this is where staff request most of the shifts that they wish to work, it is then reviewed to ensure that the roster is 'fit for purpose'.

When staff are requesting shifts through Loop, they will only be able to see shifts that correspond to the skills that they have and the posting/grade that they have.

For example, an RN cannot request a shift where they are required to have a Take Charge skill if they do not have this skill assigned to them on the main roster system, likewise, they cannot request an RN shift if they do not have a PIN number.

If you work in an area that does self rostering and cannot see any shifts to request, please speak to your unit lead before contacting the workforce team.

Updates from the trainer



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](#).

HealthRoster Access

If you or a member of your team no longer need manager access to the rostering system, please email uhd.erostrertraining@nhs.net. If there are changes to access level required to any of the staff you manage, complete the

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.

This could be to help identify rule breakages, set up or correct personal patterns, assistance on 'best practice', or an overall refresher on the system.

If this is something that you would like, please

contact uhd.erostrertraining@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

The Workforce Trainer is planning to deliver a series of 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 approximately 20–30 minutes in duration. If this is something you would be interested in, please complete the [form](#)

Refresher training

If you have retired and 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.

The refresher training can be completed via teams by attending one of the refresher courses, as a 1:1 session on site or via teams or by completing the current eLearning modules - a refresher eLearning course is being built at present.

Please contact the workforce trainer for further information.



Alternate Access Accounts

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.

Once the request is submitted it will be reviewed and if agreed, the alternate access assigned.

ALL financially based alternate access profiles have an expiry date 3 months from the date they are assigned, if access is still required after this time, a new request must be submitted.

Quick roster tips..

Closing a panel

When you click on a shift on the roster, it opens the Duty panel at the right side of the screen.

A quick way to close the panel is to use the **Esc** key on your keyboard.

This also works on any of the other roster panels that open at the right side of the screen.

Copy and Paste

Since the system upgrade in early May, a new feature has been introduced.

You can now copy duties assigned to one person and paste to another person providing there are enough unfilled duties to do this.

Highlight the shifts to copy, click Ctrl + C, go to the person you wish to paste the duties to and click Ctrl + V - please note, this can sometimes be a little temperamental.

Duty Cancel Reasons

If you have a bank or agency person who is due to work a shift for you and they contact you to advise they are sick, please use the following duty cancellation reason:

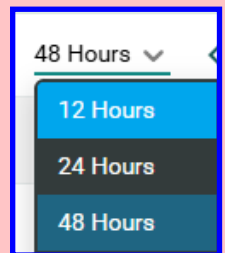
Sickness - assigned staff

This allows the temporary staffing team to monitor and report on this.

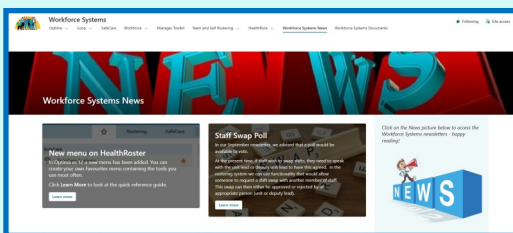


Roster View Period

There are 3 new roster view periods available; 12 hours, 24 hours and 48 hours, these may be useful to you if you wish to see what has been happening on your roster within short time scales.



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:

- 16th June 1-2pm
- 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

