



Workforce Systems Newsletter

Monthly Reminders - September



Finalisations



All shifts and unavailabilities for **August** **MUST** be finalised by **12.00** on **Friday 4 September** 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 7 September**, 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 7 September**.

Staff Absence - sickness

If a staff absence needs to be extended, please contact the Workforce team to do this, **DO NOT** add another absence episode if it is for the same sickness reason, this causes issues for the Workforce team and Payroll.

Please ensure that sickness absences are recorded with the correct reason and certification.



Quick reminders....

☺ **Moving to a new role** - 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.

☺ **Emailing the workforce team/workforce trainer:**
Managers - please make sure you include employee staff names and numbers, if it is only for 1 person, please put this in the Email Subject Line.
Staff - please add your name and employee staff number to the subject line

☺ **Moving to a new post** - managers, please remove any shifts/duties that have been assigned to the person after the date they leave your department.

☺ **Payment Progression meetings** - it is essential that these are recorded on ESR at the same time as recording a staff member's appraisal, for guidance on this, please click [here](#).

☺ **DBS Update service** - are you signed up? Want to find out more, click [here](#).



Tip of the Month

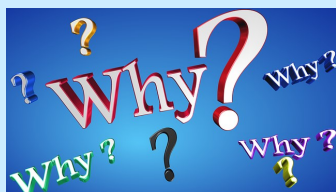


Career Breaks

Career breaks are time that a person takes away from their normal working life, within the organisation, career breaks are for 3 months or more.

If you have a member of staff who is taking a break from work, but it is less than 3 months, please record this as another suitable unpaid leave type.

If you are a manager of someone taking a career break, you **must** complete an SR3 (section 5) as well as recording it on the roster.



Why should it not be recorded as a career break?

A career break impacts on pension deductions.

Rostering - net hours project

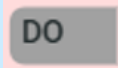
The Workforce team will soon be launching a project focused on reviewing net hours on the rosters.

The primary focus will be on net hours, however, the project will also include reviewing shift names and identifying shifts that remain outstanding and are regularly not being utilised.

As part of this initiative, we will be holding face-to-face meetings with teams across the trust. Please note that these meetings will not commence until September.

Please note: staff should not accrue more than 10 hours TOIL and it must be used within 3 months of it be accrued.

August Bank Holiday (31.08.26)

If staff do not normally work on a Monday, assign a **DO** shift  or leave the day blank.

If the person is off for the week, **Monday 31 August** should be **A/L BH** and Tuesday to Friday as A/L.

September 2026				
 31	01	02	03	04
A/L BH 07:00-23:00	A/L			

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





Contacting the Workforce Team

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

ESR Manager Self Service - Audit and Refresher

If you have been sent the audit quiz, please ensure that you complete it before 16 September. After this time the workforce team will be reviewing access and yours may be removed!

Change to an employee's working hours

If an employee is increasing or decreasing their working hours, this is actioned via ESR MSS. Please consider the information below before amending any contractual hours.

For staff who are or wish to be on a term-time only contract, if changes are required, please contact uhd.hroperations@nhs.net

Staff terminations

When you are terminating a staff member on ESR (when they are leaving the organisation), please avoid using the following leave reason - **Other/Unknown**.

Annual Leave

As we head toward autumn, staff should be starting to book in any remaining annual leave they wish to take. To review how much leave you have left, please log into your Loop account, go to the menu and select Leave.

Managers who wish to review the annual leave for the unit(s) they manage, can do so via the roster system.

Rostering>Entitlement Report

This report allows you to see total entitlement hours, entitlement used, entitlement left and also a breakdown per person per quarter.

Leave		
Annual	Study	Other
Entitlements 2026		
Annual Leave	15.67 days remaining	31 Mar 2027
Annual Leave	0 days remaining	31 Mar 2026 Expired



ALL staff should be requesting their annual leave via Loop - even those with full roster access.

loop

Loop Information

loop

Loop account issues

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

- **Log out of Loop completely and then sign back in.**
- **Ensure you have you created a Loop account.**
- **Log in with the correct email address and password.**
- **Ensure you are connected to the organisation.**

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.**



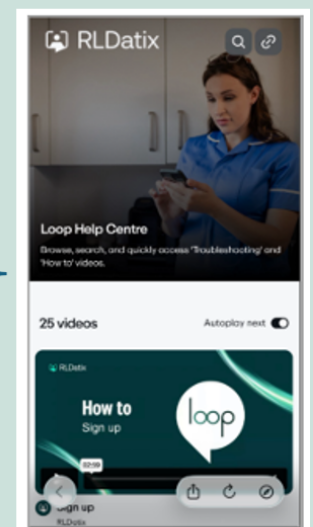
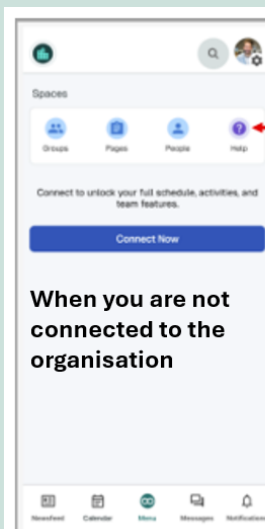
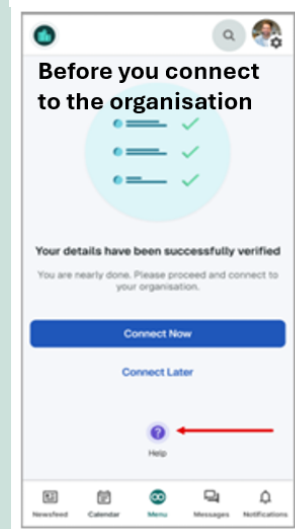
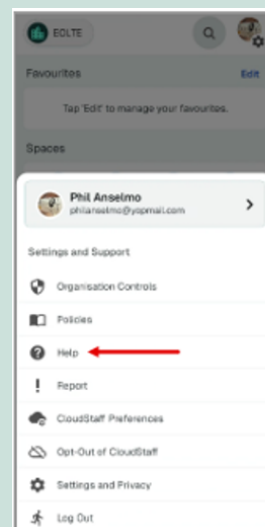
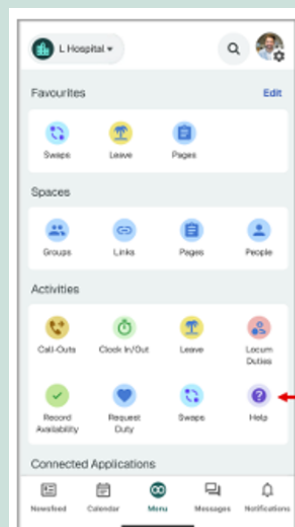
In the most recent release, a new help function has been added to the app and the web version.

The help function is accessible from the main menu, setting and support panel in the app.

The Help button gives you access to various video's relating to 'How To' guides or Troubleshooting guides.

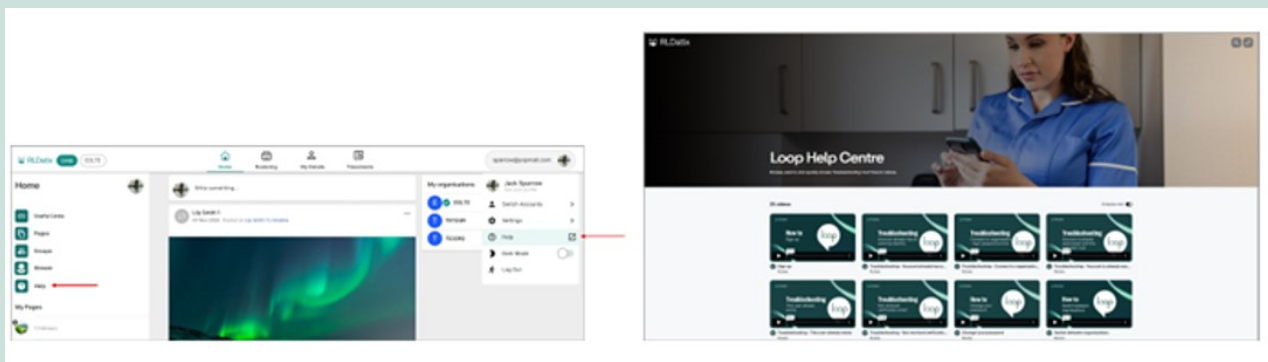
Useful troubleshooting guides include:

- Account already has an external identity
- Connect to organisation - login password errors
- Account is already associated with the selected trust
- User already exists

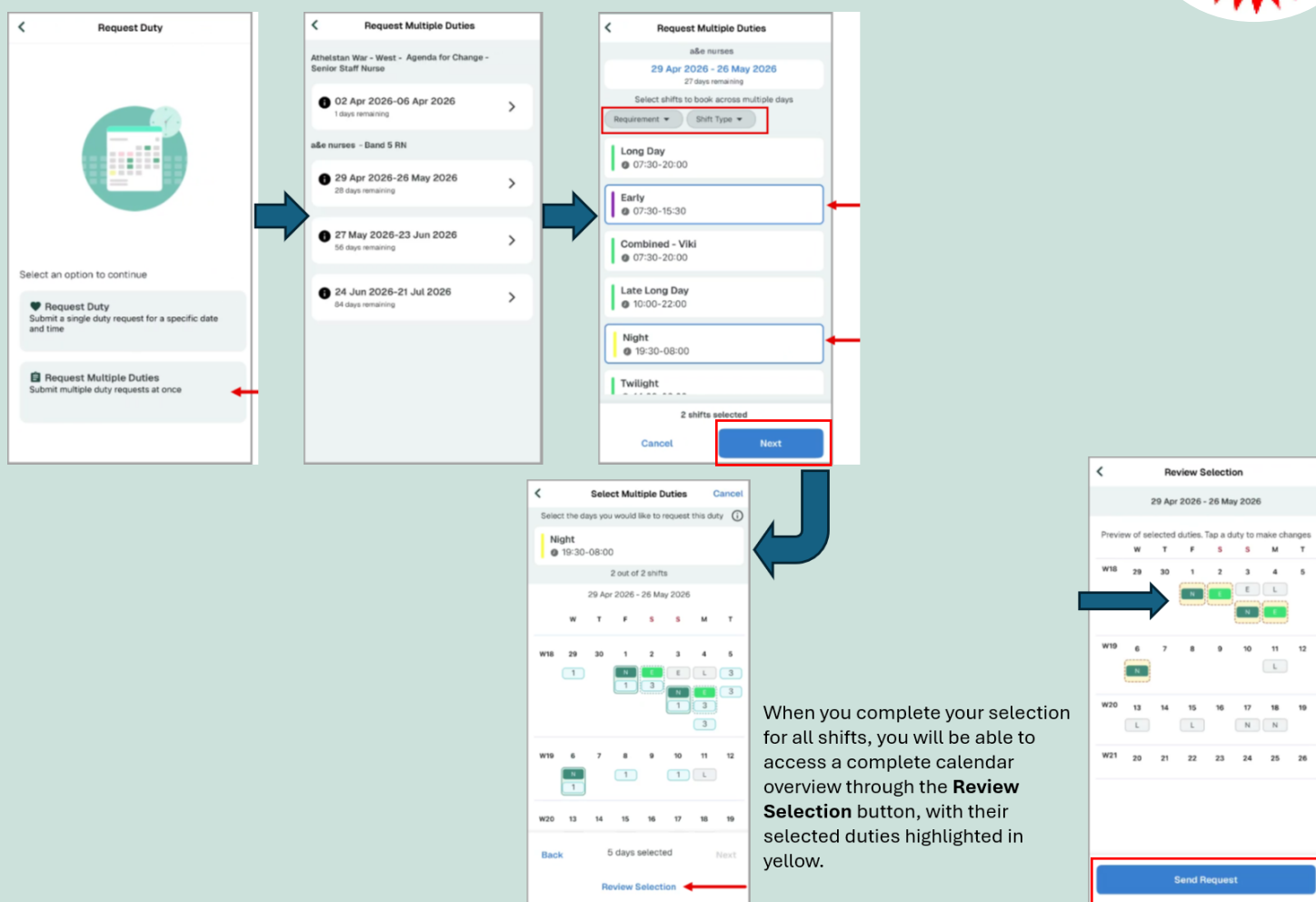


Loop Information

The help button is also available on the web version, however, it is **only** available to **when you are connected to an organisation**.



Staff who request duties now have the option to request individual duties or multiple duties at the same time.



When you complete your selection for all shifts, you will be able to access a complete calendar overview through the **Review Selection** button, with their selected duties highlighted in yellow.



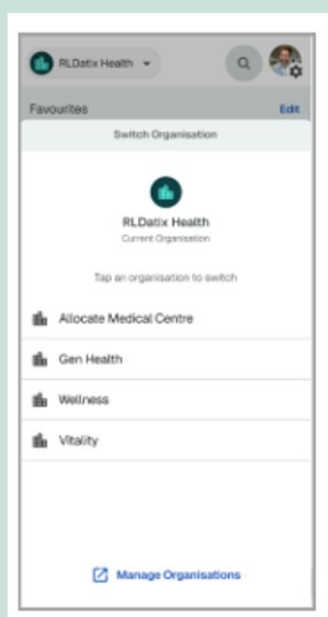
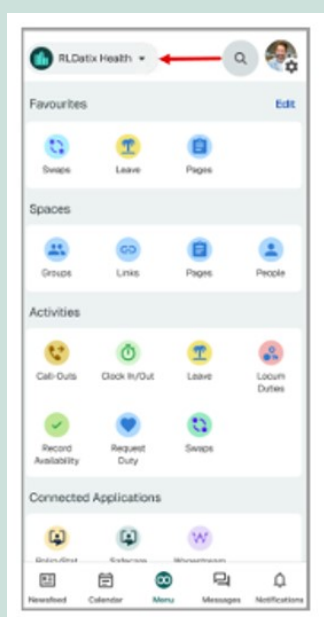
Loop Information



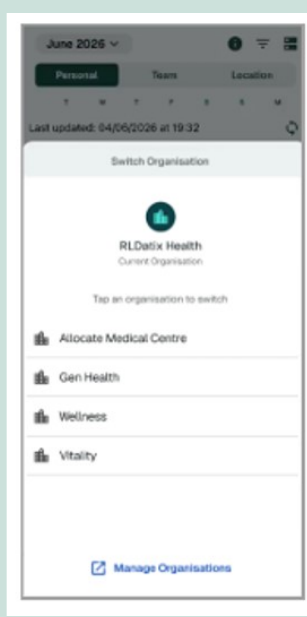
Other enhancements to the Loop app include:

Making it easier to switch organisations. Within the trust there are some staff who are linked to UHD and also another healthcare organisation. When clicking on the button indicated in the screenshot below, you will be taken to a new page where you can choose which organisation information you wish to view.

From the main menu page



From the personal roster page



Connect to organisation screen

Improvement to the error messages when you are unable to connect to the organisation. The error messages are now clearer, more specific and more actionable so that you will have a better understanding of what went wrong and what action is required.

An error message that the account is already linked to Loop.

An error message for incorrect password.

An error message that no user account exists with the specified username.

Updates from the trainer



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.eroostertraining@nhs.uk and the trainer will be happy to arrange some time with you, this can either be on site or via teams.

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.eroostertraining@nhs.net

Short training sessions

On the 17th September, the short training sessions will recommence. Each session will be no longer than 30 minutes.

If you wish to attend one of the sessions, please have a look at the [Drop-In session and Webinar](#) information on the Workforce SharePoint site and then complete the [booking form](#).

Optima Upgrade - what's new?

- Login page - now aligns with the other Optima systems.
- Change of font.
- Move Demand - new audit trail

Summary

Audit Trail

Audit Trail

☒ Changes since Roster approval

☐ All changes

Audit Event Type	User	On	Lead Time
Move Demand	Morrison, Susan (23317402)	21/08/2026 13:09	7 Days 17 Hrs
	Duty Cancel Reason	Matching duties are not available	
	Moved From	28/08/2026	
	Moved To	29/08/2026	

What roster access should I have?

Staff should have the level of access that is appropriate to the tasks they are required to perform. If, for example, you are a band 7 or band 8 and all you need is to be able to approve leave, you do not need a high access level to do this.

The new [access levels](#) are on the workforce systems SharePoint page.

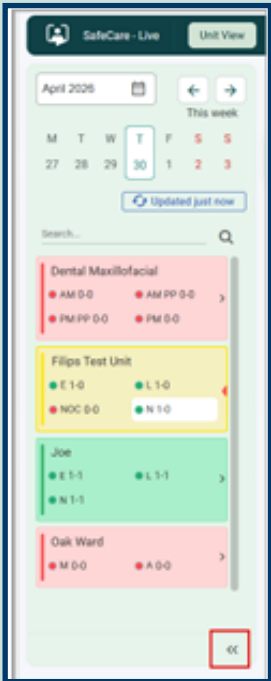


Check staff access level

Did you know that all staff with manager level access on the roster system can view the User Account information?

Go to **Admin>User Accounts By Unit**. Select your unit, change the **State** to **Active** and search.

SafeCare Live Updates

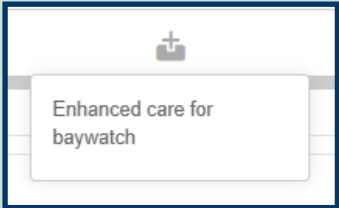


Navigation Panel

The navigation panel is now more ‘user friendly’. Clicking on the area highlighted with the red box, will hide the panel giving you more screen room.

Additional Duty Enhancements

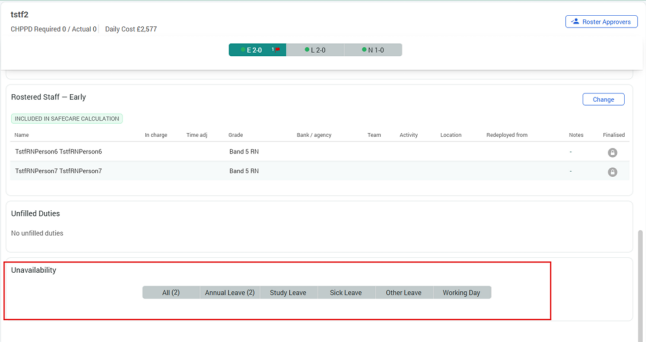
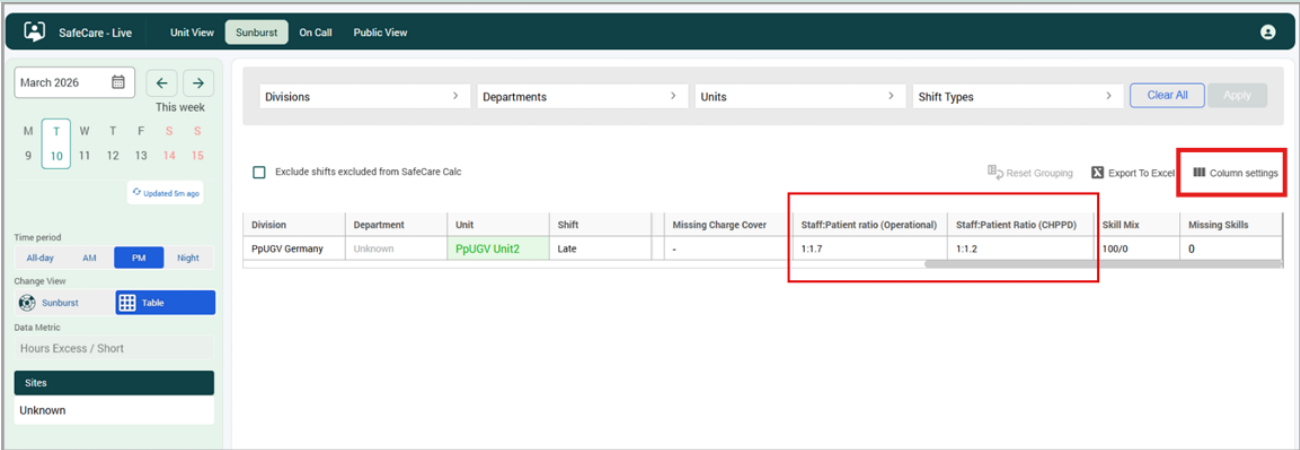
SafeCare now displays the reason for additional duties as well as the additional duty icon. Hovering the mouse over the additional duty gives a screen tip, clicking on the icon will show this information.



Sunburst

Approval - rosters which require approval will appear on the Sunburst once the roster is fully approved

There are some new columns that can be added, by click on the column settings button:



Unavailability section

This section now closes the tabs by default.

Refresher training



Some staff have already had and completed either a roster refresher assessment or ESR MSS audit assessment.

The intention of these type of assessments is to give a baseline of what people know and any training gaps.

As an organisation we need to ensure that all staff with access to workforce management systems are aware of the best ways to use them and also any changes to processes. Each person who has access to these systems will now be required to complete this type of baseline assessment every 2 years to ensure compliance.

If you receive an assessment, please complete it by the required date or you may find that your access is either downgraded or removed.

The team are not doing this to give you more work, but to provide you the correct knowledge of the processes and the best practice.

Flexible working patterns

Some staff have agreed flexible working patterns. The shifts and days off these people work need to be correctly recorded on the roster system - remember, a finalised roster is a legally binding document!

A lot of people are now choosing to work a 9 day fortnight, so work extended hours for 9 working days to give sufficient time to have 1 day off every 2 weeks.

A concern with this is annual leave. If you are working this type of pattern the leave you take needs to match your working pattern, so, if you work 8 hrs 20 mins on a day you wish to take as annual leave, this is the number of leave hours you need to request and will be deducted from your leave entitlement. Failure to do this, means that you will show as owing hours and will need to make up the time at a later date.

If you would like to discuss this further, please contact the workforce trainer.

Optima System Navigation eLearning

If you have used the system for a while or are relatively new to the system and are not sure about some of the menus, tools or filter options, please take some time to complete the Optima System Navigation eLearning module.

You can complete the module at your own page, there is no formal assessment, although there are some quiz questions in the course.



Allocate Optima eLearning -
System Navigation

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.



**Transforming
Care
Together**

Better for patients, better for staff

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

The Band 2-4 and Career Development team are running the monthly support worker forums, open to anyone working in a band 2 - 4 clinical support role.

To join the HCSW Teams Channel, please email uhd.ready2step@nhs.net or click on the link on the [Intranet page](#).

Upcoming meetings are on the following dates and times:

- 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 HCSW Teams Channel. If you want to join the Channel, click the link on our intranet page or email uhd.ready2step@nhs.net



Thrive Live

Following the success of last year's event, Thrive Live is back, and it's bigger than before....

Click the image below to access the guide.



Welcome to Thrive Live

"We are delighted to bring you our annual Team UHD health and wellbeing fair. We know how much you give every day to care for your patients, each other and your families. Working in healthcare can be incredibly rewarding, but we also recognise the pressures and challenges that come with it. Thrive Live is our opportunity to encourage you to take a little time for yourself, explore the support available and discover practical ways to look after your health and wellbeing."

With a range of expert-led sessions, activities and resources covering mental, physical, and financial wellbeing, we hope you find something that interests you and helps you feel supported. This year the focus will also be on navigating change as we prepare for transformation across our hospitals.

Our Health and Wellbeing Champions are a huge part of staff wellbeing. Having a champion within your team is one of the easiest ways to improve awareness of support, encourage wellbeing conversations and make a positive difference. If your team doesn't have a champion, we would love you to consider nominating a colleague or joining our growing network. Visit the Thrive Health and Wellbeing intranet pages to find out more.

We hope you enjoy these sessions and take away something that helps you thrive, both at work and at home. Thank you to UHD Charity for their support in making Thrive Live possible and helping us create more opportunities for our staff to prioritise their wellbeing."

Gemma Lynn
Head of Occupational Health and Wellbeing Services

Sorcha Dossitt
Workforce Health and Wellbeing Development Lead



- Mental Wellbeing
- Physical Wellbeing
- Navigating Change
- Financial Wellbeing
- General Wellbeing