

## Workforce Systems Newsletter

### Monthly Reminders



#### Finalisations



All shifts and unavailabilities for **April MUST** be finalised by **3.00pm** on **Tuesday 5 May** 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 **Wednesday 6 May**, 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 **Wednesday 6 May**.

#### ESR: Next of Kin/Emergency Contact Information

Please ensure that you check and update you next of kin/emergency contact details on ESR.

This can be done by logging into ESR, go to your **Personal Information**, click **Update my Information** and select the **My Emergency Contacts**. Check the recorded information and update if required.

#### EMERGENCY CONTACTS


### Quick notes and reminders....

- ✓ 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.
- ✓ Please ensure that any TOIL that is accrued is taken within the following roster period. If you have a member of staff who is leaving the team, they must use the TOIL they have accrued before the leave.
- ✓ Overtime - the reasons for overtime are being reviewed and updated, once the list of reasons has been finalised it will be published on the Workforce Systems SharePoint site.
- ✓ For the leave year **2027/2028** there are only 6 bank holidays in the leave entitlement.



## Tip of the Month



### Contract terminations

When substantive contracts are terminated - bank contracts are also terminated as per temporary staffing policy. Staff members can rejoin the bank after a two-week mandatory break from termination date.

### Staff terminations and annual leave

When managers are submitting a termination please ensure that annual leave accrued has been calculated and this information is on the

termination advising how many hours annual leave need paying or deducting from the persons salary.

There is an [annual leave reckoner](#) on the intranet to help you to calculate this.

Please refer to the [government website](#) for the number of bank holidays for each year.

### Returning from secondment

If someone is returning from a secondment, please complete an SR3 to return them, for any other scenarios, please look at the guidance on [HR Change Routes](#).

## Tips for sickness episodes

### Sickness episodes

If a person is off sick, and their roster shows the sickness as ended, please **DO NOT** add a new sickness episode, please update the existing sickness episode or contact the workforce help team to do this for you (if locked).

***All sickness episodes should be entered onto the roster as Open Ended.***

### Sickness over bank holidays

If you are sick on a bank holiday you will lose the entitlement for this.

### Sickness part way through a shift

If someone works **more than half of their shift** and goes home sick, add a note to the shift to say they left at X time due to sickness, **do not** adjust the shift time or add the sickness unavailability.

If someone works **less than half their shift** and goes sick this should be recorded as a full day sickness.

### Annual Leave during long-term sickness absence

Staff are not expected to away on holiday during a period of long-term sickness absence. If an employee wishes for a pre-booked holiday to be honoured or believes that the holiday will be beneficial to their recovery they must obtain written confirmation from the health care practitioner managing their care. This is covered under s18.2 Managing Absence procedure.

When processing annual leave during a long-term period of absence, upon returning the individual to the sickness absence after the period of annual leave, an SR3 must be completed informing payroll to link the two periods of sickness absence, otherwise individuals can exceed their absence pay entitlement



## Contacting the Workforce Team

Please use [uhd.workforcehelp@nhs.net](mailto:uhd.workforcehelp@nhs.net) email for roster and general workforce queries or call 5552.

## Recording bank holidays on the roster

When a bank holiday happens, 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).

## Annual Leave requests

**ALL** annual leave requests should be made via

Loop unless it is for last minute requests and a manager can add this to the roster if the roster has already been partially or fully approved.

## System Upgrades

**The rostering system is due for upgrade on the evening of Tuesday 5 May between 9.00 pm and midnight.**

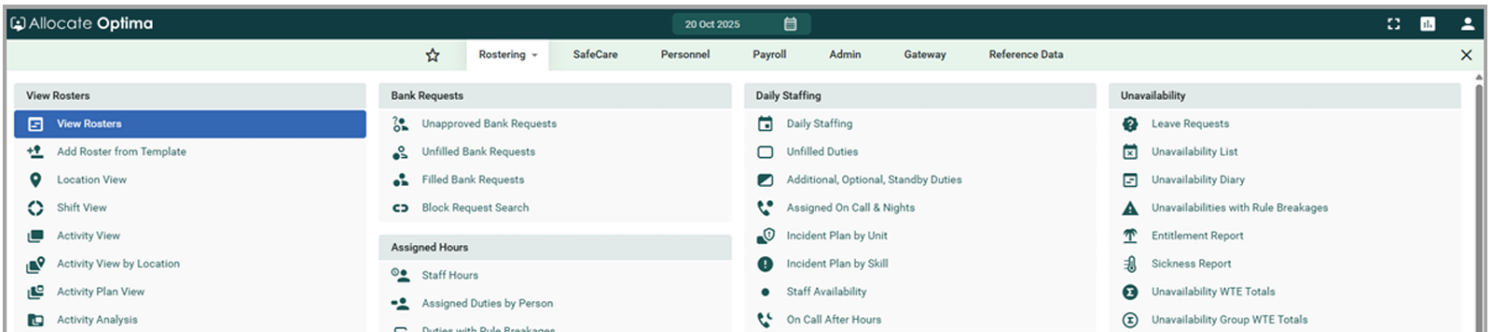
This will include the following systems:

- Optima (HealthRoster)
- SafeCare
- BankStaff

***Please ensure that you have logged out of the system before 9.00pm.***

## Optima System Changes - post upgrade

Once the upgrade to the Optima system has taken place, you will notice some changes, such as the colours. The colours for the full Optima suite; Loop, HealthRoster, BankStaff and SafeCare will have the same colour scheme.



There will also be some new features such as Copy and Paste, new roster views, enhancements to the Units Not Finalised tool, renamed Unlock buttons, enhancements to the vertical menu in the duty and unavailability panels and reordering of options on the team, roster and unavailability panels.

Please keep an eye on the Workforce Systems SharePoint site for any new guides.

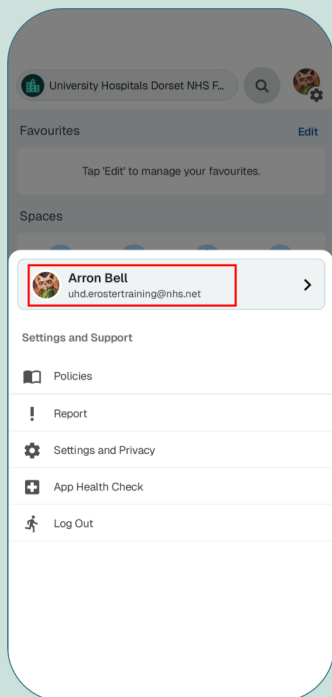
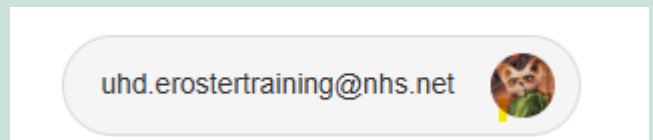
# Loop Information

## 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.**

When logging into Loop, you are now able to see the email address that you have signed up with. On Loop web it shows in the top right corner of the screen.

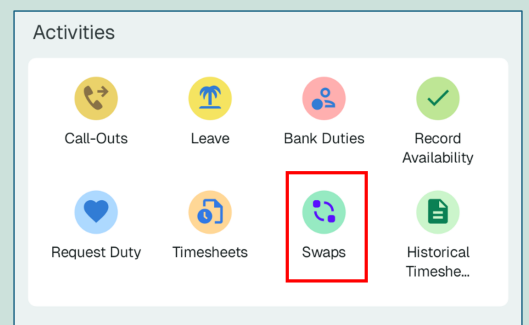


On the Loop App, click on the menu icon and then your initials or profile picture at the top right of the screen.

The panel at the bottom of the screen will show you the email address you are connected with.

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.



# 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.erostertraining@nhs.net](mailto:uhd.erostertraining@nhs.net). If there are changes to access level required to any of the staff you manage, please email [uhd.erostertraining@nhs.net](mailto:uhd.erostertraining@nhs.net) or complete the [Change to HealthRoster Access form](#).

All staff with manager level (Roster Admin and above) access to the system are able to see the access level each member of their team has.

## Support for staff using the rostering system

All staff with manager access to the rostering system can 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.erostertraining@nhs.uk](mailto:uhd.erostertraining@nhs.uk) and the trainer will be happy to arrange some time with you.

## 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](#) on the Workforce Systems SharePoint site.

## Optima eLearning

eLearning

The Optima training is now available via eLearning modules

- **System Navigation**
- **Optima Standard**
- **Optima Extras**

If you are required within your job to have manager level access to the rostering system, please complete the training checklist **before** completing the eLearning.

If you require view only access to the roster, you only need to complete the Navigation module.

The links for the training can be found on the Workforce Systems SharePoint site.

## Changing team

All staff who have access above View only to the rostering system have the appropriate access to move staff from team to team on the rosters they have access to.

If you are unsure how to do this, please watch this short [video](#).

## Retesting roster rules

This is something that you should be doing regularly as will show any new rule breakages/warnings as well as clear any warnings that are no longer applicable.

You can retest the rules either by duty or all the rules on the roster.

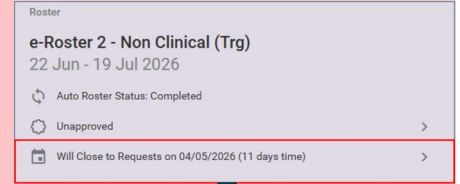
**Duty** - open the duty panel (of a shift which is orange) and click the Retest Rules button. If the warning is no longer applicable, it will clear, however, be aware that you may end up with more warnings.

**Roster** - right click on the roster bar and select Retest Rules on Roster, click OK on the confirmation message the rules will be retested, and as above, if there are warning that are no longer applicable the warnings will disappear.

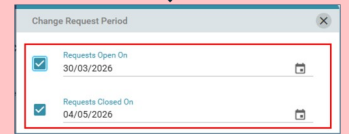
## Changing the request period

As we approach our summer rosters you may wish to change the request period dates on your roster(s).

Click the roster bar to open the panel and then change the request period.



If you wish to do this, please let your staff know.

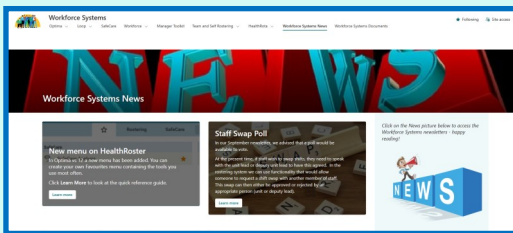


## Informative Special Periods

You may have noticed on your roster, that we now have more informative special periods (looks like a small brown dot underneath the date).

These new special periods are to inform managers when school holidays are.

## 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:

- 12<sup>th</sup> May 1-2pm
- 16<sup>th</sup> June 1-2pm
- 7<sup>th</sup> July 1-2pm
- 18<sup>th</sup> August 1-2pm
- 22<sup>nd</sup> September 1-2pm
- 20<sup>th</sup> 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

