



Workforce Systems Newsletter

Monthly Reminders - October



Finalisations



All shifts and unavailabilities for **September** **MUST** be finalised by **12.00** on **Monday 5 October** 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 **Tuesday 6 October**, 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 **Tuesday 6 October**.

Contacting the workforce team

Please ensure that when you are contacting the workforce team or the workforce trainer that you have supplied your full name and assignment number. Failure to include your assignment number can lead to delays in your query being dealt with.



Quick reminders....

- ☺ **Sickness on bank holidays** - if staff are sick on a bank holiday, the bank holiday entitlement for that day is removed from the main leave entitlement.
- ☺ **Annual Leave, 2027/2028** - next year's entitlement is less as Easter 2027 as there are fewer bank holidays between 1 April 2027 and 31 March 2028.
- ☺ **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.
- ☺ **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](#).
- ☺ **Annual Leave** - use it or lose it. No carry over or sell back of annual leave.



Tip of the Month



Part day sickness



If a member of staff goes sick after working **less than half their hours** for that day, the **full day** should be marked as sickness.

If they have worked **more than half their hours** for the day, the hours should be left and a note added to the shift, e.g. left sick at 3.00 pm - **do not** put any sensitive sickness information on the note.



Zero hours unavailabilities

There are some unavailabilities on the roster that should be left with zero work hours, these are **TOIL** and **KIT** Days. TOIL has no hours assigned as the person is taking back time they have already worked and 'banked' and KIT days have no hours as and SR3 form needs to be completed to arrange for payment. If hours are assigned to these unavailabilities, the roster will miscalculate the hours for the person.

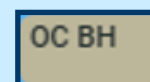
Christmas and New Year Bank Holidays



If staff do not normally work on a the day when there is a bank holiday, assign a **DO** shift or leave the day blank.

If the person is off for the week, the bank holidays should be showing as A/L BH. If this has been requested and approved as 1 full annual leave block, you will need to edit it to split out the bank holiday leave days.

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.



Kindness costs nothing...

As a team, we frequently deal with staff who are upset, frustrated or irritated either on the phone or by email.

As a team, we understand that sometimes you can get upset about things, however, please remember when communicating with the team, the person you are speaking to or emailing is trying to help you, the issue you have may be something they cannot solve straight away or it may be something that the team do not personally have direct control over, such as late payments.

We are all dealing with issues in our work or personal life. Please ask yourself, 'How would I feel if someone spoke to me like this' before you speak or email.



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 by 23:59 on Wednesday 30 September at the latest** - the date has been extended due to staff being on leave.

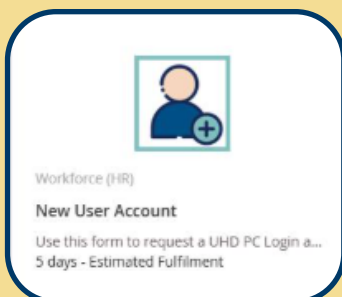
After this time the workforce team will be reviewing access and yours may be removed! If the link you have does not work or you no longer require access to ESR MSS, please contact uhd.erostertraining@nhs.net.

Change to an employee's working hours

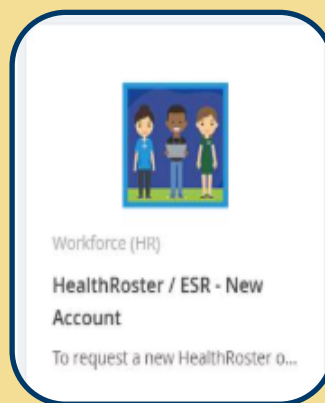
If an employee is increasing or decreasing their working hours, this is actioned via ESR MSS. Please consider the information below before amending any contractual hours.

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

Requesting new user accounts for staff



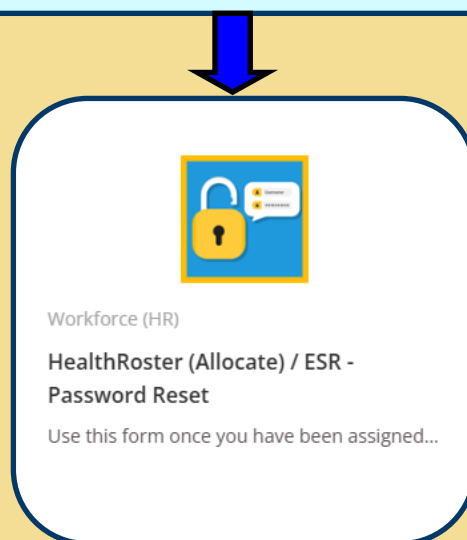
On the UHD and IT self-service portal there are forms for managers to request HealthRoster and ESR accounts for multiple people (bulk request).



If a member of staff has already been set up on HealthRoster and ESR but they do not currently have a user account, the HealthRoster / ESR - New Account form should be completed, either by the manager or the employee.

Password resets - HealthRoster and ESR

Password resets: ALL password resets for ESR, roster, planner etc must now be logged via the [UHD & IT self-service portal](#).



You will need to have your assignment number available as well as your HealthRoster username or ESR username for a password reset.

Please note, this **does not** include resetting Loop passwords, the workforce team cannot reset your Loop password.

Loop Information

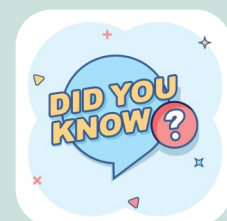
Loop account issues

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.**

On Loop you can see what clinical skills have been assigned to you along with the start and end dates.



Loop Web

Log into your Loop account, go to **My Details** and select **Skills** - this will show you all your assigned skills.

Name	Cluster	Certificate Number	Valid To
Agyle	Dept A & E	This skill has no end date	-
Cannulation	Trust Clinical Skills		10 Nov 2028
EPMA	Dept EPMA	This skill has no end date	-
IV Medicines Administration	Trust Clinical Skills		02 Feb 2029

Loop App

- Click on the **Menu** button.
- Click your profile picture or initials at the top right of the screen.
- Click on your name - this will take you to the My **Profile** page.
- Scroll down the page to see the **Skills** information.

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 recommenced. 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](#).

Drop-In sessions: Roster/Loop

There will be no further drop-in sessions scheduled at present. The last sessions are:

- Friday 16 Oct at RBH, 9.30 - 11 am in the IT Training room in the library at RBH
- Monday 19 Oct at Poole, 9.30 - 11 am; venue to be confirmed

If you have any thoughts with regard to continuing the drop-in sessions, please complete this form: [Drop-In form](#)

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.

Oliver McGowan training

There are new Study leave unavailabilities on the roster system for the Oliver McGowan training. The sessions have the correct unavailability time, please amend the start and end times as appropriate.

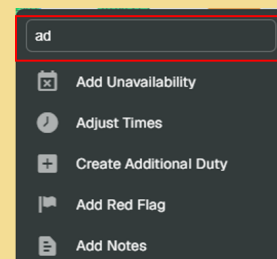
Oliver McGowan - Tier 1	OM-T1
Oliver McGowan - Tier 2	OM-T2
Oliver McGowan - eLearning	OL-eL

Updates from the trainer



Optima 12.0.5 - what's new?

Quick search in Action Menus - you can now type in what you are looking for and the menu will filter for you.

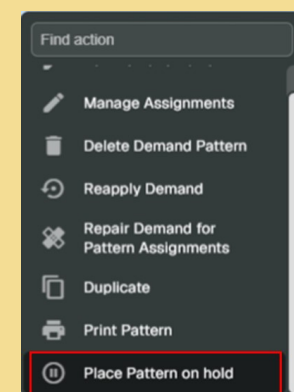


Headcount enhancement - the headcount number will change if you choose to view 12, 24 or 48 hour view. It shows '**Unique Heads per hour**' which shows the number of people who work within each hour regardless of how many duty assignments they have and '**Fractional Coverage per Hour**' which calculates the headcount based on minutes worked in each hour. Each assignment contributes a fraction that totals to 1 decimal place.

Mon, 28 September 2026												
Unfilled Duties	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00
e-Roster 1 - Clinical (Tpg)	14 September 2026 : Partially Approved											
Day	15	15	15	19	14	14	14	13	12	12		
Night										2.5	5	5

Place Patterns on Hold - some areas within the organisation use Shared Patterns, Demand Patterns and Service Plan. There is now the ability to put these type of patterns on hold. Select the pattern you wish to put on hold and select Place Pattern on hold.

The **On Hold** column will show "Y" once the pattern is placed on hold.



Name ↑	On Hold	Weeks	Assignme	Valid From	V
Band 5 Nights	Y	10	5	13/11/2023	-

And finally...

For staff who only use **SafeCare**, you can now reset your password from the SafeCare login page.

- Open the SafeCare login page.
- Select Forgotten Password.
- Type in your registered email address (in the first instance, please use your nhs.net email address).

1 Log In

Username

Password

Log in

2 Forgotten password

Reset Password

Your Email

3

Cancel **4** Submit

Refresher training



If you have had access to the roster system (HealthRoster) for some time, you may receive an email from the workforce trainer asking you to complete a baseline assessment within a specified timescale. Please do not ignore the email.

The baseline assessment is to give the trainer information on whether you need to complete some type of refresher training in order to be up to date with the current rostering practices within the organisation.

You will be notified whatever your result is, if you pass the baseline assessment, no further training will be required unless the workforce team flag that there are certain tasks you are completing incorrectly, in which case the trainer will arrange a 1:1 session with you.

If you do not pass the baseline assessment, you will be required to complete training (eLearning). If you do not complete the training in the specified time period, the workforce trainer reserves the right to remove your roster access until training is completed.

National Fraud Initiative

The Trust will be taking part in the National Fraud Initiative (NFI) data matching exercise which is operated by the Public Sector Fraud Authority and matches electronic data within and between public and private sector bodies to prevent and detect fraud. Please note that key payroll data and personal identifiers will be provided for data matching purposes.

The NFI Privacy Notice sets out how your personal data is used and your rights:

For more details, please go to:

[National Fraud Initiative privacy notice - GOV.UK](#)

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 pace, there is no formal assessment, although there are some quiz questions in the course.



Allocate Optima eLearning -
System Navigation

Medical staff on HealthRota



Please can all medical staff ensure that they have updated their email address from the old UHD email address to their current NHS.net email address or a personal email address if preferred within HealthRota.

Instructions can be found at [Changing your email | HealthRota Help Centre](#) or please email Medical Rostering for support, uhd.medicalrostering.help@nhs.net

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:

- 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

