



Workforce Systems Newsletter

Monthly Reminders



Finalisations



All shifts and unavailabilities for **July** **MUST** be finalised by **14.00** on **Tuesday 4 August** 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.

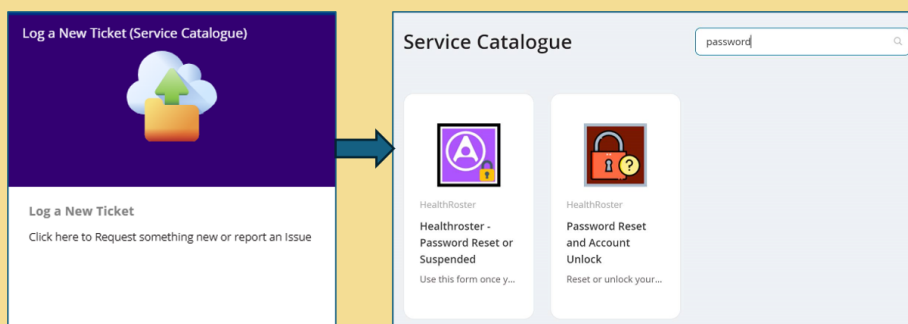
Payroll Cut Off: All Staff

Payroll changes must be submitted by **Tuesday 4 August**, 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 3 August**.

Password resets

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.



Quick reminders....

- ✓ 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.
- ✓ Do not contact the workforce team to manually update postings. Once the posting information has been processed in ESR, the roster will show the changes within 24 - 48 hours.
- ✓ If a person is moving department or leaving the organisation, ensure that any accrued TOIL is taken before they move or leave.
- ✓ 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.

Tip of the Month

Unavailabilities

There have recently been occasions where an unavailability has been added to the roster system **AND** also to ESR.

If staff are on the roster system (HealthRoster or HealthRota), **DO NOT** add the unavailability to the roster and ESR as this causes duplication and may cause other issues.



If staff take more than 2 weeks unpaid leave, this needs to be recorded directly onto ESR, please contact workforce for support or guidance.

Overtime

Overtime/additional hours can be assigned to a shift when the person has worked **agreed overtime**, this is not the same as adjusting the hours the person worked on a shift.

Overtime must be agreed by senior managers due to the cost implications.

Before overtime is added or considered, ensure that the person has already worked or been assigned their full contracted hours for that day or week.

Which option to choose?

Overtime – this is assigned to staff who hold a **full-time posting (37.5 hrs)**

Additional Hours – this is assigned to staff who hold a **part-time posting (less than 37.5 hrs)** **UNTIL** they complete 37.5 hrs per week, then overtime can be assigned.

Bank Shifts - additional guidance

Staff should only be assigned bank shifts once they have completed their contracted hours. If a person is owing a considerable number of hours for the roster period, they should not be doing extra shifts as bank.

If a person has recently returned from extended sickness; more than 7 days, they should, ideally, refrain from working bank shifts for at least 3 days to allow full recovery from their sickness episode.

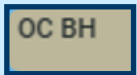
August Bank Holiday (31.08.26)

If staff do not normally work on a Monday, assign a **DO** shift **DO** 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

From August 2026 we are introducing a mandatory ESR Manager Self-Service (MSS) refresher training programme for all current MSS users.

The purpose of this refresher is to ensure that all users remain up to date with current processes and are using MSS consistently and correctly. Maintaining a high level of knowledge and compliance is essential to support accurate workforce and payroll processes across the Trust.

The workforce trainer will email you during the 1st week of August. Once you have been contacted, you will have **6 weeks to complete the assessment and achieve the required pass mark.**

What you need to do

- Complete the MSS assessment within 6 weeks of receiving the email with the assessment link.
- Achieve a minimum pass mark of **85%**.

Users who do not achieve the required pass mark will be contacted by the workforce trainer and will need to complete the full ESR MSS training within 6 weeks of their assessment completion date.

Failure to complete the refresher training within the required timeframe, or repeated failure to achieve the pass mark, may result in MSS access being suspended or removed until the required training has been successfully completed.

To ensure knowledge remains current and aligned with system and process changes, all MSS users will be required to undertake a refresher training course every two years.

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.

If staff have a salary sacrifice or sponsorship, they cannot reduce their hours.

If you are unsure please email the workforce team.

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

Loop Information

Loop account issues

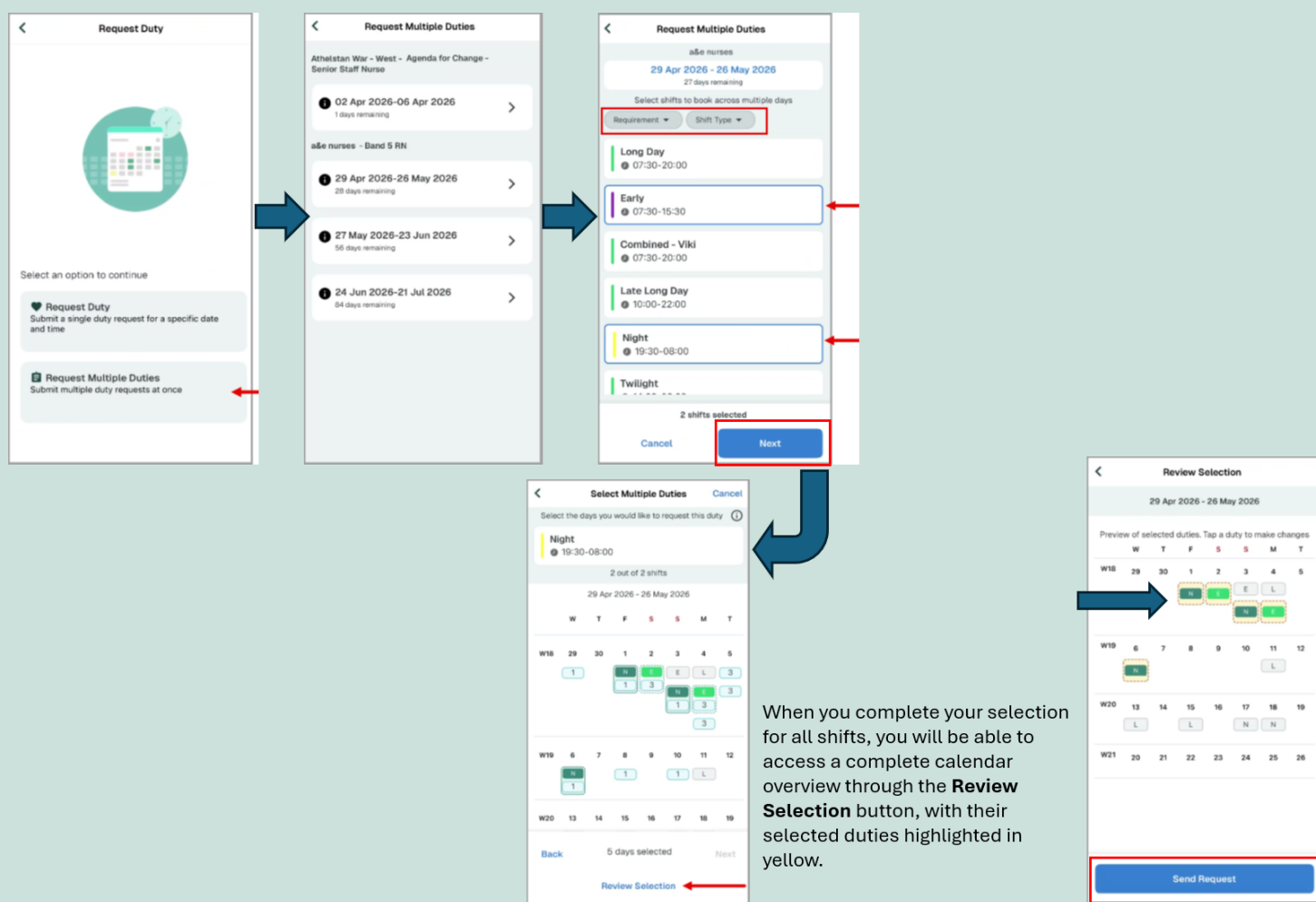
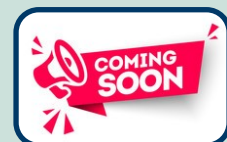
Before contacting either the workforce team or the workforce trainer about Loop issues, please do the following:

- **Log out of Loop completely and then sign back in.**
- **Ensure you have 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.**

Coming soon...

From the end of August, staff who request their days off and working duties via Loop will be able to request multiple duties at the same time - **this will be after the main Optima system upgrade.**



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.eroostertraining@nhs.net

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

Short training sessions

From 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](#).

otherwise requested. Other training options can be discussed with the workforce trainer.

Staff who have manager level access will be required to complete an assessment and possibly refresher training every two years.

When your refresher is due, you will be contacted by the workforce trainer and sent an assessment, you will have 6 weeks to complete the assessment.

Optima Refresher Assessment

The final reminder to complete the refresher assessment has been sent, if **you have received this, please complete the assessment by noon on 31 July**, if you have not completed the assessment or contacted the workforce trainer by this time, your roster access will be reviewed and may be reduced.

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.



Optima Refresher Training

The purpose of refresher training is to ensure that all users remain up to date with current processes and are using Optima (HealthRoster) consistently and correctly.

Maintaining a high level of knowledge and compliance is essential to support accurate recording across all rosters within the trust.

Refresher training will be via eLearning unless



[Change or Add a Location on a shift](#)

Rather than adding the HW unavailability, assign the shift and then change the location to HOME.

Why? If the person is off sick or requests annual leave, the shift will be cancelled, an existing unavailability needs to be updated or cancelled manually.

Optima Upgrade 12.0.4

HealthRoster, SafeCare and BankStaff are due to be upgraded on **18 August**. Please can you ensure that you are logged out of the system by 9.30 pm.

What's new?

Move Demand - audit trail; this will be a more detailed audit showing why the shift had been moved, where it was moved from and moved to.

SafeCare User Interface - ability to minimise the navigation panel.

Sunburst - two new columns will be available to display the **Staff:Patient ratio (operational)** and the **Staff:Patient ratio (CHPPD)**, these columns will be available in the column settings. They are not switched on by default.

Approval - rosters which require approval will appear only when the roster is fully approved

Roster - change of access

From Monday 3 August, the View Only access on the roster system will be changing.

At present, it allows you to view roster and staff information, add notes to shifts and unavailabilities and update attendance.

It will be changing to allow staff to approve annual leave requests. If you have manager access to the system and all you are required to do is approve leave, please contact the workforce trainer to have your access changed.

Medical Staffing

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** which must be attached to the SR3 at the point of submission.

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:

- 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 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.



The cover features a large 'Thrive Live' logo with a stylized arrow above the 'i'. Below it, the dates '14 September - 2 October 2026' are displayed. The main title 'Your guide to what's on' is centered. The background is decorated with colorful, abstract shapes and illustrations of people. A QR code is located in the center. Logos for NHS, University Hospitals Dorset, and NHS Foundation Trust are in the top right. The bottom of the cover includes the text 'Funded by' followed by the NHS logo and 'University Hospitals Dorset NHS Charity'.

Thrive Live
14 September - 2 October 2026

Your guide to what's on

Funded by  University Hospitals Dorset NHS Charity



The slide has an orange header with the title 'Welcome to Thrive Live'. It contains several paragraphs of text, a collage of photos showing people at the event, and a NHS logo. The bottom of the slide is decorated with colorful, abstract shapes.

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



A vertical list of five topics, each with a colorful, abstract icon and a title in a colored box.

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