



# Lead Employer – Microsoft Teams Channels

Work Schedule & Management Information

## **Host Organisation Microsoft Teams Channel Guidance & Information**

**2 - 4**

## Lead Employer Microsoft Teams Channel – Sharing Platform

To strengthen collaboration between the Lead Employer and Host Organisations, we are adopting Microsoft Teams Channels as a central platform for sharing files, communicating Management Information updates, and coordinating activity with Work Schedules. This approach provides a consistent, secure, and user-friendly environment that supports the way our organisations work together.

### What We Are Doing

We are creating dedicated Teams Channels for each Host Organisation, giving them a structured space where important documents such as Work Schedules or information on upcoming New starters can be hosted. Within each channel, files can be uploaded, organised, and updated in real time, ensuring that both the Lead Employer and Host Organisations always have access to the most current information.

Channels also allow us to post messages, highlight changes, and maintain a clear record of updates without relying on email chains or multiple document versions stored in different places.

### Why This Is Beneficial

Using Microsoft Teams Channels offers several key advantages:

- A single, central location for information
- Hosts no longer need to search across systems or inboxes—everything is stored in one accessible channel.
- Increased transparency and consistency
- Everyone sees the same information, reducing the risk of outdated documents or missed communications.
- Real-time updates and version control
- Files can be updated directly within Teams, with full version history available so changes are transparent and reversible.
- Stronger collaboration
- Teams facilitates quick communication, shared discussion, and joint problem-solving within the channel environment.
- Security and governance
- Teams ensures that information is shared securely, with access controlled appropriately for each organisation.



## What This Means for Host Organisations When Sharing Files

For Host Organisations, sharing files via Teams means:

- You can upload Work Schedule documents directly into your channel, where they are automatically stored in a secure SharePoint location linked to Teams.
- Any documents you share will be visible to both the Host Organisation and Lead Employer, creating a single shared workspace rather than multiple disconnected copies.
- You can update or replace files as needed—ensuring the Lead Employer always has access to the latest version.
- Communication around files (e.g., queries, clarifications, context) can happen right alongside them, within the same channel in the chat function.
- Overall, using Teams Channels streamlines the way we work together. It supports clearer communication, reduces duplication, and ensures that host-related information is easy to locate, manage, and keep up to date.

### Lead Employer Contact Details

#### Management Information Onboarding Queries:

Onboarding Team Manager: [Rebecca.ryder@merseywestlancs.nhs.uk](mailto:Rebecca.ryder@merseywestlancs.nhs.uk)

#### Work Schedules Rotations and Contract Queries:

Employment Operations Team Manager: [rachel.murphy2@merseywestlancs.nhs.uk](mailto:rachel.murphy2@merseywestlancs.nhs.uk)

Employment Operations Team Manager: [Angie.Rutherford@merseywestlancs.nhs.uk](mailto:Angie.Rutherford@merseywestlancs.nhs.uk)

#### Requests for being added to the Teams Channel:

Service Development: [le.servicedevelopment@merseywestlancs.nhs.uk](mailto:le.servicedevelopment@merseywestlancs.nhs.uk)



## Accessing the Teams Channel

Once you have been added to the Teams Channel for your Host Organisation by Lead Employer you will have to use Microsoft Authenticator to access this.

Please follow the steps below to add Microsoft Authenticator to your Microsoft account. If you experience any issues, please contact the Service Development team for assistance at [le.servicedevelopment@merseywestlancs.nhs.uk](mailto:le.servicedevelopment@merseywestlancs.nhs.uk)

Microsoft Authenticator step by step guide:

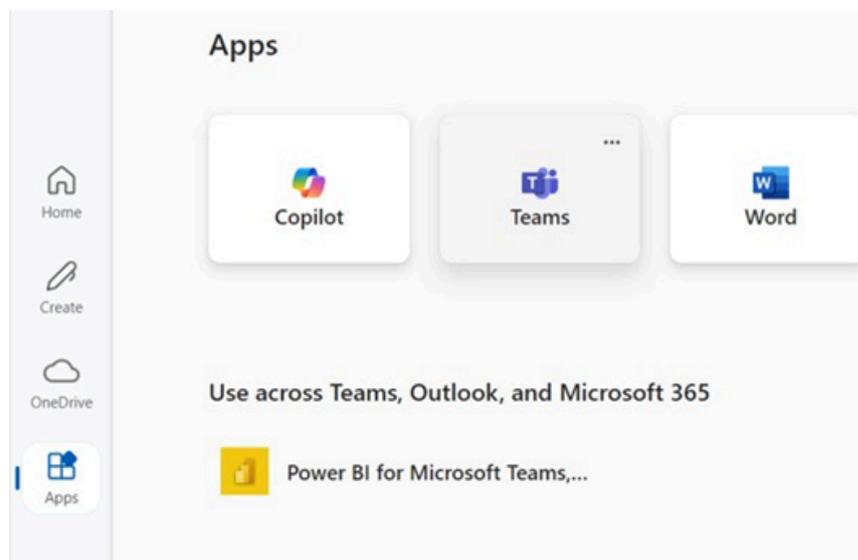
1. Sign in to Office.com:

- Open a browser (Microsoft Edge or Google Chrome).
- Go to [www.office.com](http://www.office.com).
- Sign in when the login screen appears.



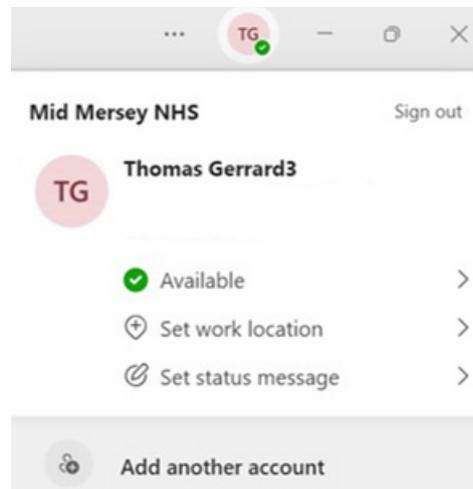
2. Open Teams via the Web:

- After logging in, open the left-hand sidebar.
- Click 'Apps'.
- Select 'Teams' to open it in your browser.



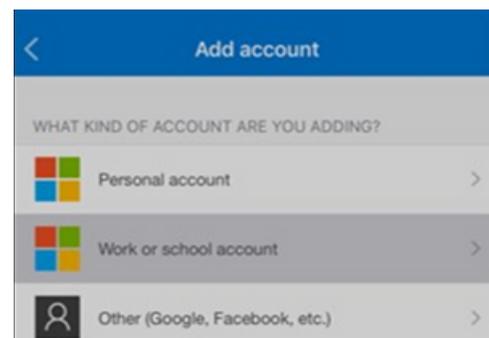
### 3. Start the Mid Mersey Authentication Setup:

- In Teams, click your initials/photo (top-right).
- Select the 'Mid Mersey' account (may show a warning triangle).
- Follow prompts until a QR code appears.



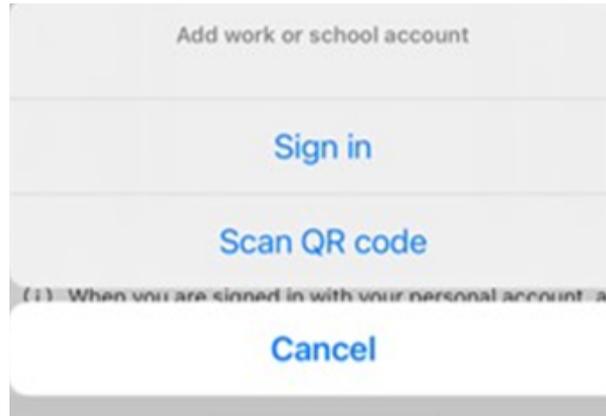
### 4. Prepare the Microsoft Authenticator App:

- On your personal mobile phone, download 'Microsoft Authenticator' from your device's app store.
- Open the app and tap 'Add account' (+).
- Choose 'Work or school account'.



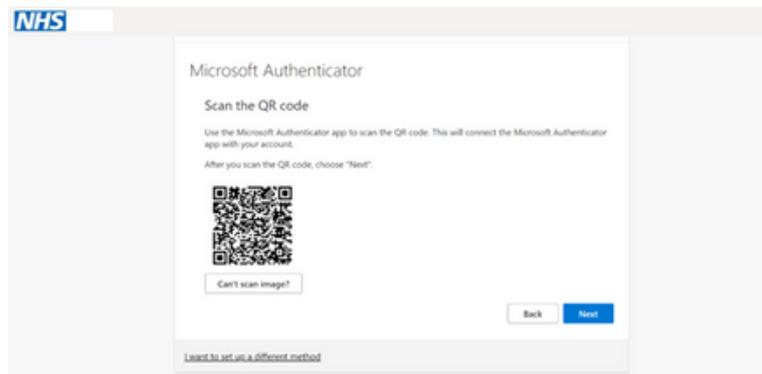
### 5. Choose to Scan a QR Code:

- When prompted on your phone, select 'Scan QR code'.



### 6. Scan the QR Code:

- Use your mobile device to scan the QR code shown on your PC.



### 7. Complete Verification:

- After scanning, your phone will display a 2-digit code.
- Enter this code on your PC.
- Your Mid Mersey account is now set up in Microsoft Authenticator.

#### After Setup:

- You can close the browser and open Teams on your desktop.
- To access Mid Mersey channels, click your initials and switch to the Mid Mersey account.

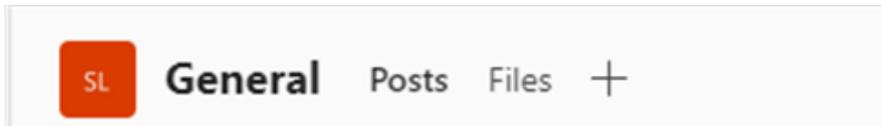
More information about Microsoft Authenticator can be found [here](#)



## Teams Channel Overview - Step By Step Guide

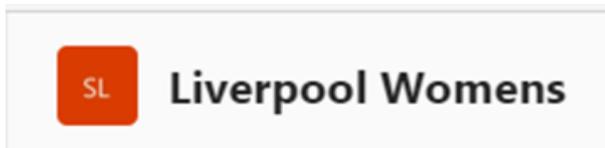
### 1. General Channel:

- Used to share information with all hosts
- Not private — all Trusts can see posts and comments.
- Used for updates that impact all Trusts.



### 2. Private Channel:

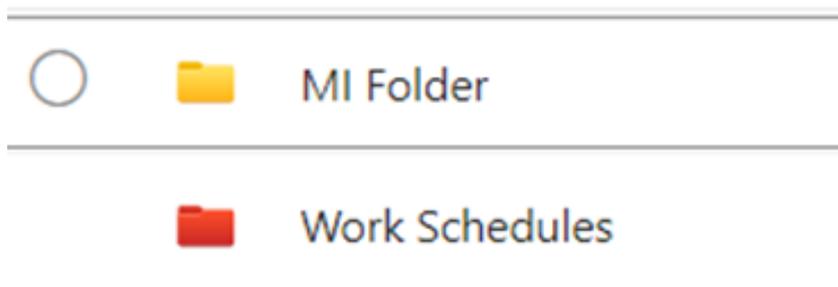
- Used to share Trust-specific information.
- Only members of your Trust and Lead Employer can see the content.



### 3. Work Schedules & Management Information (onboarding)

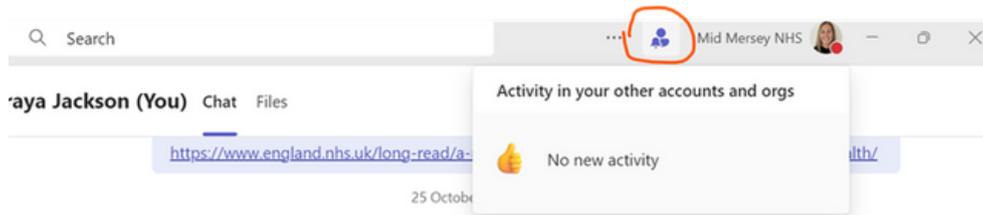
- Located in the 'Files' tab within your private channel you will find Work Schedule and Management Information
- Documents follow naming monthly naming conventions for easy identification.

For questions about the process for either Work Schedules or Management Information, contact Lead Employer or post in your Trust Chat or see information below.



#### 4. Notifications in the New Teams App:

- If using the new Teams app, you can see activity from your private channel while in your organisation's main Teams tenant.
- Click the 'Activity' tab in your organisation's Teams view.
- Any new activity from your private Mid Mersey channel will appear here.



## Management Information Process

Within the Management folder, you will find four files structured in the same way as the Work Schedule Lists. Each file covers a three-month period, and the months displayed will always align with the current point in the year. For example, on 1 May, the Apr–Aug–Dec file will display August, the Feb–Jun–Oct file will display June and the Jan–May–Sept file will display May,

These files provide Management Information (MI) in a refined and consolidated format. All key information relating to each rotating doctor—such as contact details, onboarding status, health restrictions, and pay protection—appears in a single row within one tab. This makes it easy to view all relevant data at a glance. There is no action required on the documents for the host organisation it is information only.

The MI document is generated from several Lead Employer sources and is updated on the same schedule as the Work Schedule process: 10 weeks, 8 weeks, 6 weeks, 4 weeks, 2 weeks, 1 week, and daily in the period immediately before rotation.

If you have any questions regarding the MI, please post them in the channel, and the team will be happy to support you.



Name	Modified By	Modified	+ Add column
Apr-Aug-Dec	Thomas Gerrard3	October 16, 2024	
Feb-Jun-Oct	Thomas Gerrard3	October 16, 2024	
Jan-May-Sept	Thomas Gerrard3	October 16, 2024	
Mar-Jul-Nov	Thomas Gerrard3	October 16, 2024	



## Work Schedule Process

### 1. Downloading and Preparing Work Schedules:

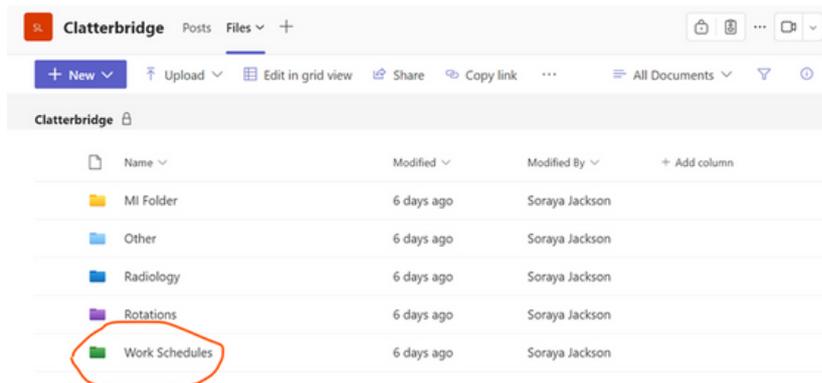
Work schedules must be downloaded from your current rota management system (e.g., Allocate, DRS). If your system does not support downloads, use the blank template available in the General Channel files titled 'Junior-docs-2016-contract-template-work-schedule'.

### 2. Naming Conventions:

Save each work schedule using: Surname, First Name, GMC Number, Specialty.

### 3. Uploading Work Schedules:

- Open your private Teams channel.
- Go to the Files tab and open the Work Schedules folder.
- Select the relevant year folder (e.g., 2026).
- Select the relevant month folder (e.g., February 2026).
- Open the Received folder.
- Upload files individually or as a folder.



Name	Modified	Modified By
2025	January 14, 2025	Thomas Gerrard3
2026	January 14, 2025	Thomas Gerrard3
Work Schedule Lists	March 27, 2025	Thomas Gerrard3
Work Schedule Upload - Step by Step Proc...	September 6, 2024	Jamie Christopherson



Betsi Cadwaladr > Work Schedule > 2026 > 2. February

Name	Modified	Modified By
Actioned	January 14, 2025	Thomas Gerrard3
Queried	January 14, 2025	Thomas Gerrard3
Recieved	January 14, 2025	Thomas Gerrard3
Work Schedule List	January 14, 2025	Thomas Gerrard3

#### 4. Review of Work Schedules:

The Lead Employer team will review submissions. If accepted, schedules will be updated in internal trackers and moved to the Actioned folder.

Betsi Cadwaladr > Work Schedule > 2026 > 2. February

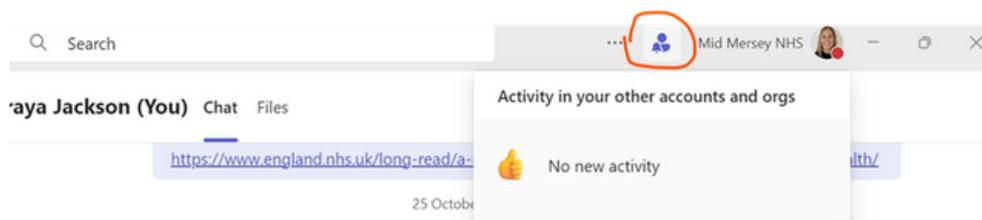
Name	Modified	Modified By
Actioned	January 14, 2025	Thomas Gerrard3
Queried	January 14, 2025	Thomas Gerrard3
Recieved	January 14, 2025	Thomas Gerrard3
Work Schedule List	January 14, 2025	Thomas Gerrard3

#### 4. Review of Work Schedules:

The Lead Employer team will review submissions. If accepted, schedules will be updated in internal trackers and moved to the Actioned folder.

#### 5. Notifications:

Users of the new Teams app can view activity from their private channel via the Activity tab while in their organisation's main Teams tenant



## 6. Queries on Work Schedules:

If issues are identified, files will be moved to the Queries folder. A message will be posted in the post section detailing the issue, required actions, and timescales.

Name	Modified	Modified By	+ Add column
Actioned	Yesterday at 10:07 ...	Soraya Jackson	
Queries	Yesterday at 10:08 ...	Soraya Jackson	
Received	Yesterday at 10:08 ...	Soraya Jackson	

## 7. Amended Work Schedules:

After correcting issues, upload the amended schedule to the Received folder and reply to the private message confirming actions completed.

Name	Modified	Modified By	+ Add column
Actioned	Yesterday at 10:07 ...	Soraya Jackson	
Queries	Yesterday at 10:08 ...	Soraya Jackson	
Received	Yesterday at 10:08 ...	Soraya Jackson	

## Work Schedule List:

The Work Schedule folder contains four files, each covering a three-month cycle (e.g., Apr–Aug–Dec). The relevant month is displayed based on the rotation period.

This document provides tracker information including work schedule received dates and Code of Practice compliance.

It is updated 10, 8, 6, 4, 2, and 1 week before rotation, and daily during the final week.

Trusts may add comments using empty columns only.

Name	Modified By	Modified	+ Add column
2023	Soraya Jackson	November 28, 2023	
2024	Soraya Jackson	November 28, 2023	
2025	Georgia Nichol	September 23, 2024	
Work Schedule Lists	Thomas Gerrard3	March 27	

Name	Modified By	Modified	+ Add column
Apr-Aug-Dec.xlsx	Thomas Gerrard3	March 31	
Feb-Jun-Oct.xlsx	Thomas Gerrard3	March 31	
Jan-May-Sept.xlsx	Thomas Gerrard3	March 31	
Mar-Jul-Nov.xlsx	Thomas Gerrard3	March 31	

