

Workforce Business Systems (RLD) Programme

Optima and Bank Role Based Authentication Model

12th November 2025

1. Change Log

Issue	Date	Notes
Draft 0.1	6 th November 2025	Created by Jayson
Draft 0.2	12 th November 2025	Updated by Bank
Draft 0.3	13 th February 2026	Updated by S McNairn

1. Introduction

The Workforce Business Systems programme has identified a need to publish a role-based authentication model, which will specify the various roles and associated permission for each access level. These roles apply separately to Optima and BankStaff.

This paper has been coproduced by Core Team and Bank Team to document the Model.

Roles Within Optima		
User Profile	Permissions	Example Role
Roster Full Approver	All First Approver, Creator & Maintainer permissions below, plus: Full Approval (publishing the roster)	Manager Lead Nurse Service Lead
Roster Partial Approver	All Creator & Maintainer permissions below, plus: - Partial Approval of drafted roster - Maintenance of Patterns, Entitlements, Rosters & Local Reporting - SafeCare - prof. Judge. & Red Flags	Senior Charge Nurse Manager
Roster Maintainer	- Day-to-day maintenance of hours, i.e. Edit/Swap/Cancel shifts - Update staff skills (Registrations, Work related skills) - Maintenance of Patterns, Entitlements, Rosters & Local Reporting - SafeCare - prof. Judge. & Red Flags	Team Leader Charge Nurse Nurse in Charge Manager
Roster Creator	- Add Demand - Create Roster - Approve leave & shift requests - Absence Management - Partially Approves Rosters - Manages Leave Requests	Ward/Dept Administrator Charge Nurse Team Leader
SafeCare Only – Can Send to Bank <i>(No Rostering access to Optima)</i>	- Updating Attendance (SafeCare) - Add/Edit unavailability (Sickness, Study Leave, Special leaves) - Send Shifts to Bank - SafeCare - prof. Judge. & Red Flags	Nurse in Charge Team Leader
SafeCare Only – Cannot Send to Bank <i>(No Rostering access to Optima)</i>	- Updating Attendance (SafeCare) - Add/Edit unavailability (Sickness, Study Leave, Special leaves) - SafeCare - prof. Judge. & Red Flags	Nurse in Charge Team Leader

LOOP Substantive	- Allows Staff access to LOOP - Request & View AL Balances - Request DO's and shifts if made Available to View on LOOP - View Published Rosters (Can be own or full team view)	All staff would require this function
LOOP Substantive (View BankShifts Only)	- Allows Staff access to Loop - Request & View AL Balances - Request DO's - View Published Rosters (Can be own or full team view)	
Roles within BankStaff		
User Profile	Permissions	Example Role
Ward Access – Full access	- User can Add and Edit Bookings - User can Add and Edit Timesheets - User can Add and Edit Retrospective Bookings	Team Leader Charge Nurse Nurse in Charge Manager
Ward Access – Requester	User can Add and Edit Bookings	Nurse in Charge Team Leader
Ward Access – View Only	User can view bookings only	Ward/Dept Administrator Charge Nurse Team Leader

Please note that each of the BankStaff roles by can be applied to a person not listed in the examples. This request will be authorised by a Chief Nurse.

Breakdown of Access within each Profile

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