

NHS Professionals New User Guide

Welcome to NHS Professionals, you have recently been issued with a client web user account to enable you to navigate around NHSP Our Bank system. Our Bank is the NHSP booking platform that managers use to do the following:

Rostered Services:

- Approve timesheets
- Change timesheets
- View worker refusals

Note: All live Rostered areas should use Healthroster to add/amend shifts rather than use Our Bank.

Sending shifts to NHSP

- All live rostered services should send shifts to NHSP via Healthroster.
- Only those staff with appropriate authorisation should send shifts to NHSP for both bank and agency.

Lead Time:

When sending shifts to NHSP via Healthroster these should be added as far in advance as possible to increase the likelihood of the shift being filled. Our aim is for shifts to be filled by bank workers wherever possible, and where they cannot be filled with a bank worker, to then follow the Trust's agency cascade. Our data shows that shifts added in a 3-6-week window generates the highest bank.

fill.

Booking Reasons:

To enable NHSP to accurately report shift request reasons to the Trust, please select the correct booking reason for example 'vacancy', 'sickness', 'training'. If the reason 'vacancy' is selected we would expect these to carry a longer lead time as the department would already be aware of the requirement to cover the shift, unlike sickness which can often be a last-minute request.

Agency Bookings:

A shift entered in Healthroster, will transfer through to NHSP padlocked from agencies. There are circumstances you will need to change the padlock's setting to ensure that shift is sent to agencies, in line with your organisation's policies.

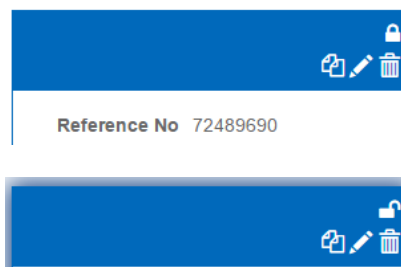
The shift will progress through the agency cascade as per the Trust agreed timescales if it has not already been filled by a bank worker. Bank workers are also able to 'bump' agency workers out of shifts.

Managers should not contact agencies directly to arrange agency workers, and all discussions and requests should come through NHSP with the exception of Theatres/Maternity where direct agency booking access will be given as agreed with the Trust Management Team.

Removing Agency Padlocks:

In order to remove an agency padlock, locate the shift you wish to allow agency to fill in Our: Bank and click on the padlock icon in the tile's header.

The icon will spin and when the padlock has been removed the icon will have changed. This will then allow NHS Professionals to send the shift to the commercial agencies your trust have an arrangement with.



Cascade to agency (Golden Key Removal):

In some instances, your organisation *may* use an agency that requires a Golden Key authoriser to give specific authorisation to be used. These shifts will have a key icon in their header.

As with allowing agency fill, you can click the key and this will allow that shift to be sent to those agencies that require this authorisation.

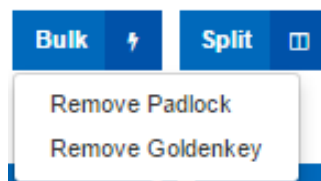
Please note, not all system users will have permission to authorise this.

Bulk cascade to agency/padlock removal:

You may wish to allow agency fill or cascade to agency on multiple shifts. You can achieve this using the "Bulk" option next to the date range box.



Clicking bulk will give you two options (if you are authorised to perform these actions)



Selecting Remove padlock will allow agencies to fill these shifts. Clicking Remove Golden Key will allow cascade to those agencies for all shifts on this tab with that requirement.

Cancelling Shifts:

If you want to cancel a shift on NHSP when the shift is filled:

Click on the pen icon



In the modify shift window click on the remove worker option. If you have informed the worker, select Yes from the drop down menu. Or select No if you haven't informed them (NHSP will then inform the worker.)

Click Save Changes

You may be presented with the “Never Cancel Bank” pop up.

This allows you to book the Bank worker into another available shift. Click book on one of the available shifts. Mark the “Flexible Worker Notified” as NO. Click Confirm – this will reallocate the Bank Worker, NHSP will notify them.

Never Cancel Bank - Increase shift fill

Ref #	Date	Start	End	Code	Location	Ward	Type	Action
1: [redacted]	25 Sep 2023	07:00	13:00	CSW00	[redacted]	[redacted]	Standard	Book ✓

Once the shift is unfilled, go bank to Optima and select “Reset to Unit Fulfilment”, this will then pull the shift back to Optima.

Retrospective Bookings:

All shifts should be added through Health Roster in advance of the shift. In exceptional circumstances, where it has not been possible to add the shift in advance of the shift start time, you have the ability to add the shift retrospectively up to 168 hrs (7 days) after the shift start time through Healthroster.

This 168-hour period should give sufficient time to add any retrospective shifts. The Trust's position is that there should be no retrospective bookings outside of the 168-hour period. If a situation arose where a retrospective booking needed to be added outside of the 168 hours, a retrospective booking form must be completed and sent to the NHSP agencies team to enable them to action this at nhspagencies@nhsprofessionals.nhs.uk

As this would be outside the parameters allowed by the Trust, this information would also be shared with the Trust, and services will be contacted to understand the reasons for the retrospective booking, and the measures that have been put in place by the service to prevent retrospective bookings outside of the 168 hours occurring.



Timesheet Approval:

Bank workers are paid on a weekly basis (every Friday) by NHSP for shifts worked Monday to Sunday day, Sunday night shifts would fall into the following week's pay. A bank worker needs to release their authorised pay by midnight on a Sunday in order to get paid the following Friday.

After a shift is worked, a timesheet is generated in Our Bank, and it is the manager's responsibility to approve the timesheet. Only managers nominated by the Trust can authorise timesheets. One of the biggest areas of complaint, and often leads to bank and agency workers seeking alternative work outside of the Trust, is their timesheets not being approved in a timely manner.

Please look at timesheets waiting for approval daily in your workflow in Our Bank and approve where authorised to do so. Please ensure to have additional approver per area to cover out of hours and over the weekend enabling business continuity.

Shift times can be amended on the timesheet where a worker stayed longer (however this will not be reflected in Healthroster unless the shift was amended in Healthroster). If a worker disagrees with the authorised timesheet (for example, the times are incorrect or break was deducted but was not taken), they have the ability to reject the timesheet and provide a reason. This would then need to be changed and re-approved by a manager, to enable the worker to release the timesheet and receive payment.

Reports on unauthorised and queried timesheets can be obtained from Our Bank.

Inductions:

When booking a member of staff for the first time on a ward you will be prompted to confirm if a local induction has taken place and if the local induction checklist was completed. This is an important part of making sure your new member of staff feels comfortable, confident and safe

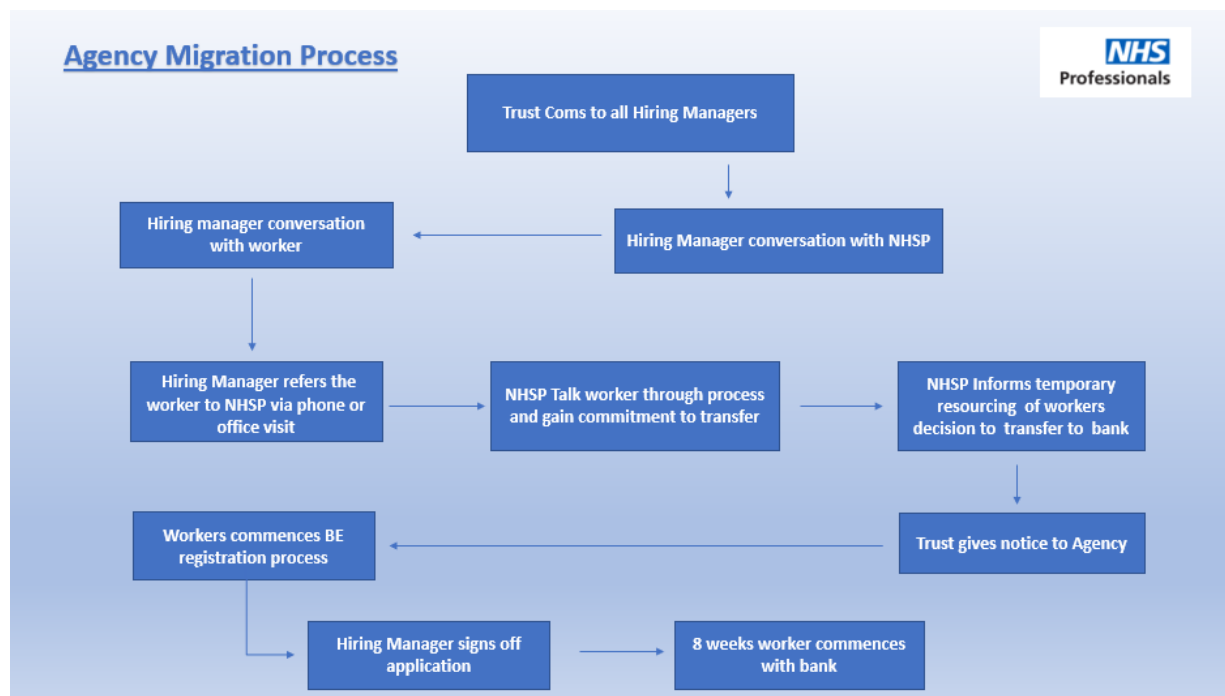
in their role. The Trust has a Local Induction Checklist contained within the Trust Induction and Mandatory Training Policy on the intranet, and a copy is also contained on the NHSP intranet pages on the Trust intranet site. It is imperative that the induction includes the local fire induction as well. Once the induction has taken place, you would confirm this in the drop-down menu on Our Bank.

Fraudulent activity:

Under no circumstances should a manager directly book themselves into shifts or authorise their own timesheets (where they have worked bank shifts). A fraudulent activity report is published weekly, and appropriate action would be taken, should it be found that this practice has occurred.

Agency Migration:

A key piece of our work to support effective service delivery, patient care, patient safety and value for money is to support the migration of agency workers onto NHSP. Where an agency worker is identified as being eligible for migration, NHSP will contact the manager to discuss in more detail and agree a process to support a smooth transition onto the bank so as not to incur transfer fees.



Admin/ Support & AHP Placements Team:

All placements for admin and clerical, support services and AHP &HCS should be sent directly to the central teams on their specific email address once approved by finance (paypanel@boltonft.nhs.uk). Placements forms will only be allowed to be completed by the designated budget holders. The placement form should be completed with as much detail as possible to enable the central team to advertise and recruit the candidates with the relevant experience.

Complaint & Incident Management system:

We are here to help and endeavour to support our Bank Members, Applicants and Client Trusts. We welcome compliments, complaints, and feedback to help ensure we continually improve our service.

Once you have submitted your feedback, the relevant team will be in touch with you; depending on the nature of your concern/feedback timescales for a resolution may vary. Don't worry though - you will be kept updated with the progress throughout this time.

We are continually working to review, assess and improve our processes and service and are grateful for all feedback we receive. Please use the link below to access the relevant form.

<https://www.nhsprofessionals.nhs.uk/campaigns/support-and-feedback>

Useful Contacts:

- Admin & Clerical and Support Services Central team - nonclinical@nhsprofessionals.nhs.uk
- AHP/ HCS Central Team ahp&hcs@nhsprofessionals.nhs.uk

For any other advice or support please call 0300 3033947 or email bolton@nhsprofessionals.nhs.uk

Onsite NHSP office opening hours 8.00am – 18.00pm

National Service centre [03332 407 552](tel:03332407552)