

# Welcome to **Our:Bank**

Our:Bank is NHS Professionals' (NHSP) smart shift management platform where you can book and modify shifts, authorise timesheets and check the status of your shift fill.

Our:Bank works on the latest versions of popular **web browsers on laptops, tablets and smart phones, it's never been easier!** We recommend you bookmark the following link in your web browser or add it as a shortcut on your phone/tablet to make it easier to navigate to.

**[bank.nhsp.uk](http://bank.nhsp.uk)**



# Things to remember

## Logging into Our:Bank

- You will be emailed your login details automatically from NHSP.
- Once you receive the email you will be able to access Our:Bank straight away for managing your shifts and timesheets.

## Entering shifts onto Our:Bank

- Where applicable\* shifts should be entered onto Our:Bank as far in advance as possible.
- For trusts with a two-tier process, timesheet authorisation will be 'pending' until approved by a senior staff member.
- Once authorised, shifts will automatically be cascaded to the relevant bank staff and depending on rules at the trust these available shifts can also be cascaded to agencies as well.
- The Our:Bank system should be monitored to check for bank members booking into available shifts.

## Ensuring Payment for bank members

- Shifts should be added to Our:Bank in advance of bank members arriving on shift to ensure all compliance is met.
- Timesheets should be authorised as soon as possible after the shift is completed.
- Bank members have to ensure timesheets are released for payment by 23:59 on a Sunday to get paid on the Friday and can only do this after the timesheet has been authorised.

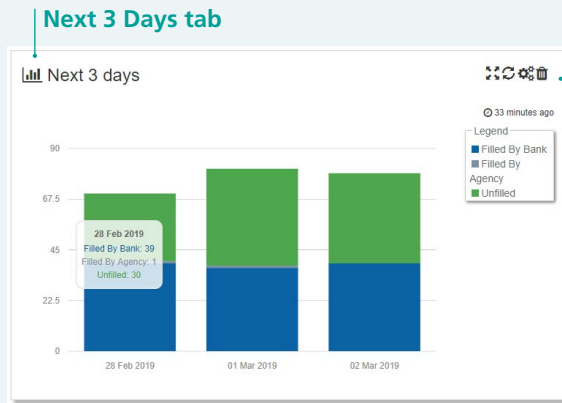
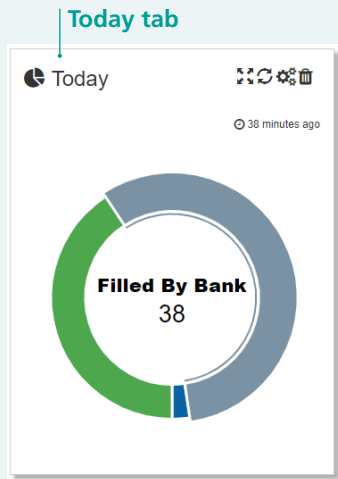
## Personalising Our:Bank

- Your Our:Bank page is unique to you and can be adapted to display the information you need to see.
- You can add Tabs & Graphs using filters which allow you to see the information you need, when you need to see it.

\*This function is not available to all managers / administrators, please check local details for e-rostering provision.

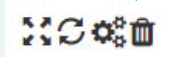
## Home tab

The home tab displays important information. By default you will see the **Today Graph** and the **Next 3 Days** chart. These are graphical representations of the shift details held in the **Today** and **Next 3 Days** tab:



You can move your mouse over the graphs to see more information about shift details.

You can also **modify, resize and remove the charts** using the icons in the top right:



# Adding a shift

Under the NHSP's logo in the top right, you will see the **Add a Shift** button:



Clicking on this will show the **New Shift** pop up.

The 'New Shift' form is a complex interface with several sections. At the top, there are two dropdown menus: 'Location' (with 'Training Location 1' selected) and 'Ward' (with 'Ward Or Dept 1' selected). Below these are fields for 'Shift Date' (18 Jan 2019), 'Shift start', and 'Shift end', each with a red asterisk indicating it is a required field. There is a 'Predefined shift times' button. The 'Worker' section has an 'Unfilled' status and a search icon. The 'Request reason' field has a red asterisk. The 'Gender' field is set to 'No Preference' and the 'Shift Type' is 'Standard'. There are also fields for 'Code' (with a red asterisk), 'Secondary Code', and 'Time before to match to secondary code' (set to 'hours'). A 'Notes' section is at the bottom with checkboxes for 'Show notes to FW' and 'Show notes to agency'. At the very bottom are buttons for 'Create shift', 'Save as draft', 'And add another', and 'Clear'.This image shows two dropdown menus side-by-side. The 'Location' menu is open, showing options: 'All', 'Training Location 1', 'Training Location 2', 'Training Location 3', and 'Training Location 4'. The 'Ward' menu is also open, showing a long list of clinical departments such as 'A and E Admin', 'A and E Clinical Services', 'A and E Nursing', 'Accommodation', 'Acute Estate Management', 'Acute Medicine Clin Services', 'AMU East', 'AMU West', 'Anaesthetics Administration Clin Ser Dept', 'Anaesthetics and Portering', 'Anaesthetics Clin Services', 'Antenatal Clinic', 'Anti Coagulation', 'Audiology', 'B D U Escalation', 'Bank Control', 'Bereavement', 'Biochemistry', and 'Bowel Cancer Screening'.

## \*Location/Ward –

If you have multiple Locations / Wards attached to your profile, you will need to select the required options from the drop down lists.

The details you **must** enter are indicated by a red asterix.

## Shift Date:

You will need to enter the date of the shift using the shift date box.

The image shows a close-up of the 'Shift Date' input box. It contains the text '02 Jan 2017' and has a red asterisk and a calendar icon to its right, indicating it is a required field.

Clicking on this box will display a calendar. From this **click the date you require the shift to be worked.**

The image shows a calendar for January 2017. The date '02 Jan 2017' is selected and highlighted in blue. The calendar has a grid with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates. There are 'Apply' and 'Cancel' buttons at the top right, and a 'Range Request' checkbox below them.

# Range Requests

If you require the same shift over a number of days, you can use the **Range Request** option:

You can select the date the shift range starts on and then click the end date of that range (you will be able to remove days out of this range later). Click apply once happy.

02 Jan 2017

26 Jan 2017

Apply

Cancel

<

Jan 2017

Feb 2017

>

Range Request

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4

If you have selected a date range, when you click apply, a new section on the page will be displayed:

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Filled with One

Many FW

You can **remove days of the week** (days that the work is not required) and you can specify if the range can be filled by one bank member only, or by many.

## Shift Start/End

You will also need to enter the times of the shift. **These must be in a 24 hour format.** For some locations you will see pre-defined shift times which can be selected.

Shift start

Shift end

07

:

00

14

:

00

# Filtering / Searching for shifts

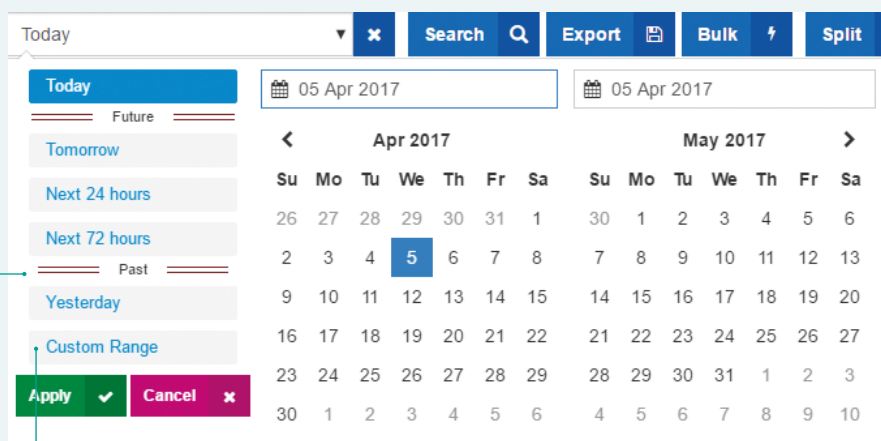
There are a number of options available to you for you to search and filter for shifts.

If you have access to more than one ward/dept you can select individual wards/depts or multiple wards at one location to display on that tab only. **You can do this using the drop down lists:**



The screenshot shows two side-by-side dropdown menus. The left menu is labeled 'Location' and has 'All' selected. The right menu is labeled 'Ward' and also has 'All' selected. Both menus have a blue downward arrow icon on the right side.

Please note that if you leave the **Location and Ward drop down list entries as All**, you will limit the options you have to be able to search by dates, this feature is in place to keep the number of shifts more manageable:

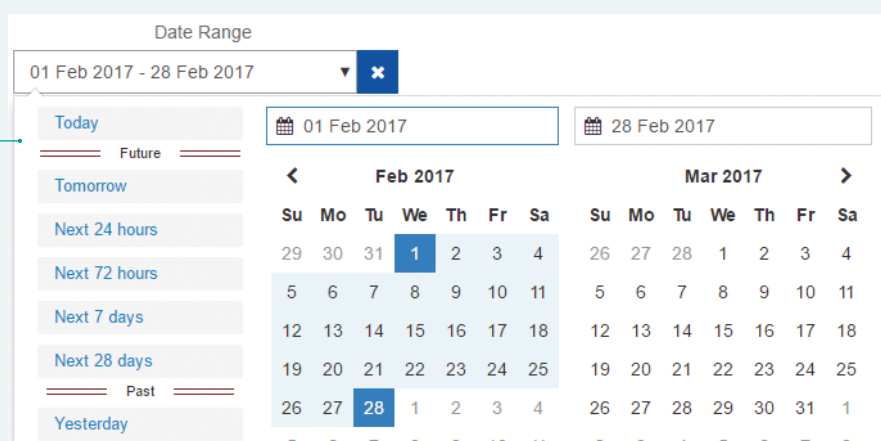


The screenshot shows a date selection interface. At the top, there's a 'Today' dropdown, a 'Search' button, and buttons for 'Export', 'Bulk', and 'Split'. Below this, there's a 'Future' section with options: 'Today', 'Tomorrow', 'Next 24 hours', 'Next 72 hours', and 'Past' (which includes 'Yesterday' and 'Custom Range'). The 'Custom Range' option is highlighted. To the right, there's a calendar view for April and May 2017. The date '05 Apr 2017' is selected. At the bottom, there are 'Apply' and 'Cancel' buttons.

You can enter a custom date range but will be limited to 3 days only if all locations and wards are chosen.

If you have selected an individual ward/dept, you will have a **far greater list of options for date searches:**

The more wards you choose the less days can be shown.



The screenshot shows a date range selection interface. At the top, there's a 'Date Range' dropdown with '01 Feb 2017 - 28 Feb 2017' selected. Below this, there's a 'Future' section with options: 'Today', 'Tomorrow', 'Next 24 hours', 'Next 72 hours', 'Next 7 days', 'Next 28 days', and 'Past' (which includes 'Yesterday'). The 'Next 28 days' option is highlighted. To the right, there's a calendar view for February and March 2017. The date range '01 Feb 2017' to '28 Feb 2017' is selected. At the bottom, there are 'Apply' and 'Cancel' buttons.

Once you have selected these options, you will need to click **Search** to return the associated shifts:

Location

Ward

All

All

▼

▼

Search

Q

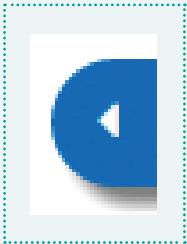
Export

📄

Bulk

⚡

You can filter the shifts you see by using the **Filtering Options**. On the right hand side of the page, expand the filter options:



Select the options you wish to filter by in the **expanded box**:

To refine your search you can use filtering options. The tab you are on will only display shifts that match this criteria.

FILTERING

Clear all

×

Worker

All

×

Authorisation

Authorised

×

Status

All

×

Timesheet Status

Select

×

Sort results by

Shift Date

📅

Agency fill allowed

All

×

Cascade to agency

All

×

Staff group

All

×

Registered

All

×

Shift

Select

×

Your search results are displayed in a list format.

Worker column is the fill status.

Reference No	Date	Start	End	Code	Worker	Location	Ward	Type	Status	Action
84500863	18 Jan 2019	07:00	20:30	CSW00		Training Location 1	Ward Or Dept 2	Standard	Unfilled	📄🗑️🔍🔗
84500864	18 Jan 2019	07:00	20:30	CSW00	FW32 Training Training	Training Location 1	Ward Or Dept 2	Standard	Filled by Agency	📄🗑️🔍🔗
84500865	18 Jan 2019	07:00	20:30	CSW00	FW2 Training	Training Location 1	Ward Or Dept 2	Standard	Filled by Bank	📄🗑️🔍🔗
84500866	18 Jan 2019	07:00	20:30	CSW00		Training Location 1	Ward Or Dept 2	Standard	Unfilled	📄🗑️🔍🔗

This sign (A) explains that the shift has been sent to an agency and also available to bank members.


# Deleting a (booked) shift

Deleting a shift that is booked is similar to deleting an unfilled shift, but you will be prompted for more information. You can either cancel the bank member from the shift on their behalf, or you can delete both the bank member and the shift if the shift is no longer required.

Before cancelling a bank member from a confirmed shift, consider whether colleagues from another ward or department need support. Contact your local NHSP team if such a need becomes apparent.

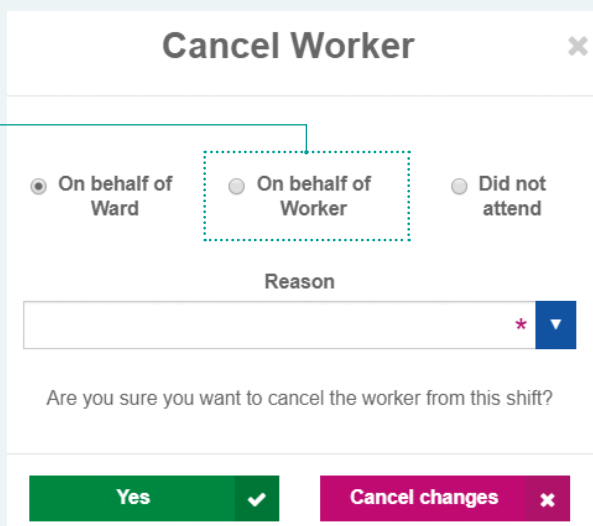
If no other options exist, you can cancel a bank member and delete a shift in the following way.

## Cancelling the bank member:

Click the  icon in the tile's header.

If the bank member cannot cover the shift, select **On behalf of Worker** option.

This only cancels the bank member from the shift. The vacant shift will remain after this is complete.



**Cancel Worker** ✕

☒ On behalf of Ward ☐ **On behalf of Worker** ☐ Did not attend

Reason

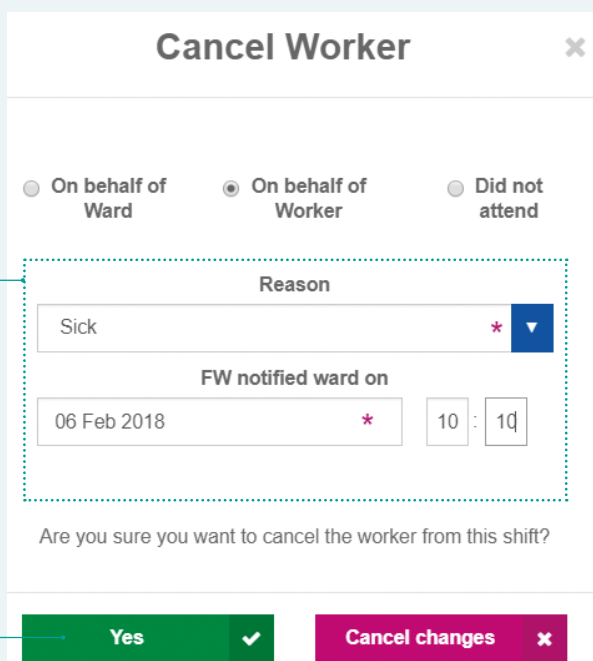
Are you sure you want to cancel the worker from this shift?

**Yes** ✓ **Cancel changes** ✕

Select a **Reason** and the **Notified Date and Time**

Click **Yes** when you have completed this – the bank member will have been cancelled and the shift will remain to be available to other bank members.

If you are cancelling the bank member because they are no longer required, e.g. shift will be filled by ward staff, use the **'On behalf of Ward'** option and fill out the detail. **It is very important to indicate if you have informed the worker or not.**



**Cancel Worker** ✕

☐ On behalf of Ward ☒ On behalf of Worker ☐ Did not attend

Reason

Sick

FW notified ward on

06 Feb 2018 10 : 10


Are you sure you want to cancel the worker from this shift?

**Yes** ✓ **Cancel changes** ✕

If you have not, the bank member will be informed by NHSP.



## Deleting the bank member and the shift

You can use the  icon and fill out the details of the cancellation.

Once again, **it is important that you indicate if the bank member has been notified.**

### Delete Shift ×

Reason code

Data Input Error ▼

Flexible Worker Notified

Yes ▼

Are you sure you want to delete this Shift?

Confirm ✓

Cancel ✕

# Modifying Shifts

Once created a shift can be modified easily through the **Modify Shift** icon. Most details of the shift can be changed including the addition or change of a bank member on the shift.

Reference No

84500866

Shift Date

18 Jan 2019

Time

07:00 - 20:30

Location

Training Location 1

Ward

Ward Or Dept 2

Code

CSW00

Type

Standard

Status

Unfilled

Show Details

Modify Icon

Modify Shift

Location

Training Location 1

Ward

Ward Or Dept 2

Shift Date

18 Jan 2019

Shift start

07 : 00

Shift end

20 : 30

Predefined shift times

Worker

Unfilled

Request reason

Sickness

Gender

No Preference

Shift Type

Standard

Code

CSW00

Secondary Code

Time before to match to secondary code

hours

Notes

Show notes to FW

Show notes to agency

Save changes

Cancel changes

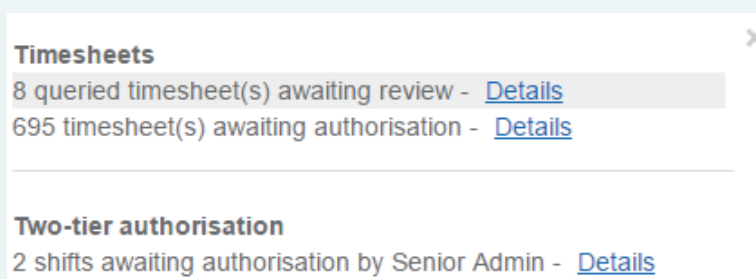
If you cancel a bank member whilst modifying the shift you will be asked the questions as shown under the **Cancel Worker** information above.

# Notifications

Notifications are displayed in the top right of *Our:Bank*:



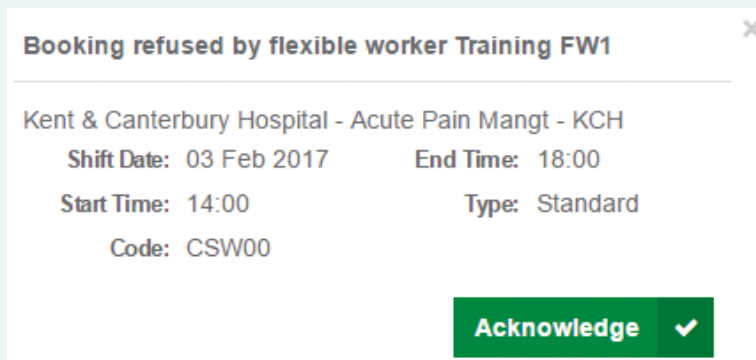
Clicking on the envelope will display the notifications.  
You will see a number of different options:



By clicking on 'Details' the relevant shifts or timesheets will be shown.

## Shift notifications

If a bank member cancels a shift within 24 hours of its start time, you will see a notification of these:



**You should acknowledge these notifications where you see them.**

# Shift & Timesheet icons



## Padlock

Shift is stopped from cascading to any agency. Authorised users can remove the padlock by clicking on the icon.



## Unlocked Padlock

Padlock has been unlocked (removed) to enable the shift to go to agencies.



## Female Staff member required

Shift can only be filled by a female member of staff.



## Male Staff member required

Shift can only be filled by a male member of staff.



## Split Shift

User can split a shift or timesheet into two parts.

Used when a bank member has been moved to a different ward part way through their shift.

Only users who have two or more wards attached to their *Our:Bank* profile will see this icon.



## Range Shift

Indicates the shift is part of a range request.



## Induction is Required

Bank member booked into the shift is required to go through an induction (orientation).



## Reject or Authorise a Pending Shift

Managers / administrators can reject or authorise shifts.



## Delete

This is used for removing a shift, including shifts that are already filled.



## Smart Card

This icons will display if a bank member has logged their Smartcard details on *Our:Bank*.



## Clone

Creates a copy of the shift being cloned.

Opens a prepopulated "Create Shift" form, the information on the form matches the shift being cloned. Users can amend the cloned shifts information before adding the new shift.

Authorised users can clone a shift by clicking on the icon.



## Key (Golden Key)

Shift is stopped from going to higher tier agencies. Authorised users can remove the key by clicking on the icon.



## Note Pad

Notes are attached to a shift. Managers / administrators can view notes and select for bank members to view these also.



## Modify

Authorised users can modify (change) the details of a shift.



## Cancel Bank Member

User can cancel (remove) the bank member booked into a shift.



## Fill with one Bank Member

Shift is part of a range request that can only be filled with one bank member.



## New to the Ward

Bank member booked into the shift has not worked on the ward before.



## Authorise Timesheet

(only appears on time-sheets)  
Only visible to users who can authorise eTimesheets.

# Timesheets explained

Timesheets should be authorised as soon as possible. Timesheets will be available via the Timesheets awaiting authorisation tab.



Set your filters and click search:

Location

All

▼

Ward

All

▼

Range


All









▼

Search

Q

Timesheets are displayed as green coloured shifts.

You can authorise the timesheet using the Authorise Icon (  ) in the action column:

Reference No	Date	Start	End	Code	Worker	Location	Ward	Type	Status	Action
84502394	22 Jan 2019	07:00	20:30	CSW00	FW31 Training Training	Training Location 1	Ward Or Dept 31	Standard	Not Authorised	   
84502393	22 Jan 2019	07:00	20:30	CSW00	FW31 Training	Training Location 1	Ward Or Dept 31	Standard	Not Authorised	   

Time

Break

Total

Actual

07:00 - 20:30

01:00

12:30

Booked

07:00 - 20:30


01:00

12:30

07:00

20:30

CSW00

Check the work and break times by using the clock icon (  ) next to the end time:

Modify Timesheet

Location

Training Location 1

▼


Ward

Ward Or Dept 31

▼

Worker

FW31 Training



Request reason

Sickness

▼

Code

CSW00

▼

Shift Type

Standard

▼

Shift start

07:00

end

20:30

Break time


01:00

Total time

12:30

Cancel changes

Authorise

You can modify the timesheet using the modify icon (  )

If you are modifying a timesheet change the details as required, then click the 'Authorise' button to save the modifications and complete the authorisation at the same time.

Reference No	Date	Start	End	Code	Worker
84500835	12 Jan 2019	07:00	14:00	CSW00	FW1 Training
<div><div>Booking Reason</div><div>Sickness</div></div> <div><div>New to the ward</div><div><input checked="" type="checkbox"/></div></div> <div><div>Queried</div><div><input checked="" type="checkbox"/> Details</div></div> <div><div>Authorised by</div><div>training31</div></div> <div><div>Authorised date</div><div>17 Jan 2019</div></div>					

Stayed late 1 hour

Training FW1

17 Jan 2019 12:07

If a bank member has Queried a timesheet, these will be displayed in the 'Queried Timesheets' tab. To view the query, click anywhere in the timesheet to expand the timesheet and then click on the 'Details' link.

## Notes:

## Notes:

### Useful Contact Information:

Service Centre is open 24/7/365



03332 407 552



[www.nhsprofessionals.nhs.uk](http://www.nhsprofessionals.nhs.uk)

