

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





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 possible* shifts should be entered onto Our:Bank as far in advance as possible.
- For trusts with a two-tier process, shift 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.

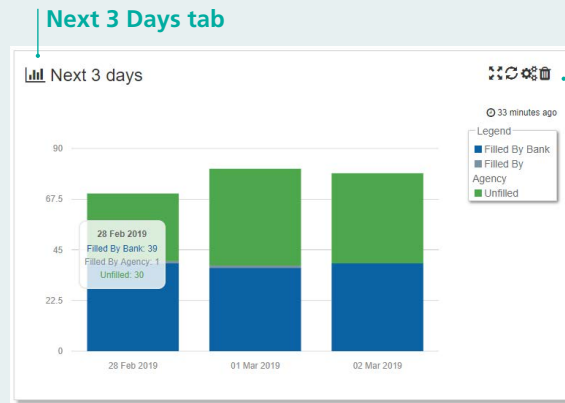
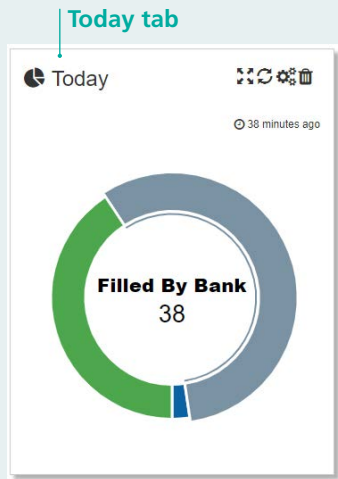
Personalising Our:Bank

- Your Our:Bank access 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.

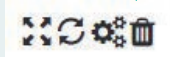
Home tab

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' dropdown is set to 'No Preference'. The 'Shift Type' dropdown is set to 'Standard'. There are fields for 'Code' (with a red asterisk) and 'Secondary Code'. A 'Time before to match to secondary code' field is set to 'hours'. A 'Notes' text area is at the bottom left. On the right, there are checkboxes for 'Show notes to FW' and 'Show notes to agency'. At the bottom, there are buttons for 'Create shift', 'Save as draft', 'And add another', and 'Clear'.This image shows two dropdown menus. The first is labeled 'Location' and has a list of options: 'All', 'Training Location 1', 'Training Location 2', 'Training Location 3', and 'Training Location 4'. The second is labeled 'Ward' and has a long list of options including '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 'Shift Date' input box with the text '02 Jan 2017' and a red asterisk indicating it is a required field. There is also a calendar icon next to the text.

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. The calendar has a grid of days from Sunday to Saturday. The date '2' is highlighted in blue. There are buttons for 'Apply' and 'Cancel' at the top right. A 'Range Request' checkbox is also visible.

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.

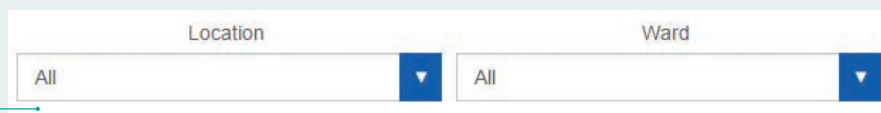
Shift start Shift end

07 : 00 14 : 00

Filtering / Searching for shifts

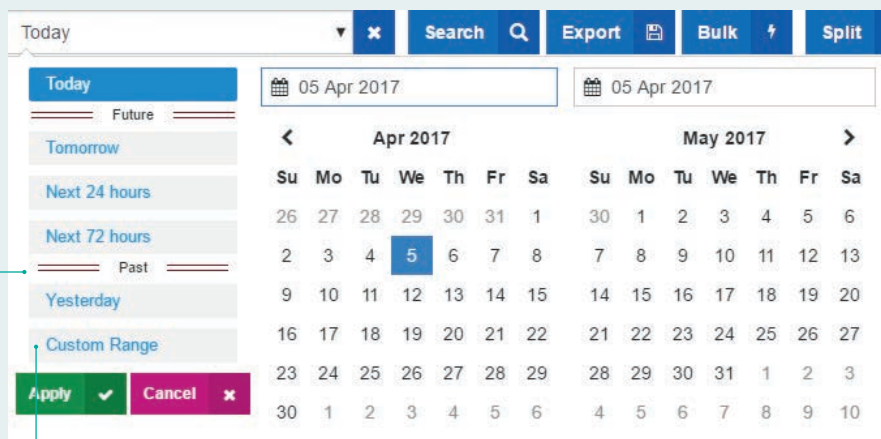
There are a number of options available to you for you to search and filter for shifts.

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 dropdown menus. The first is labeled 'Location' and has 'All' selected. The second is labeled 'Ward' and also has 'All' selected. Both dropdowns have a blue 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:

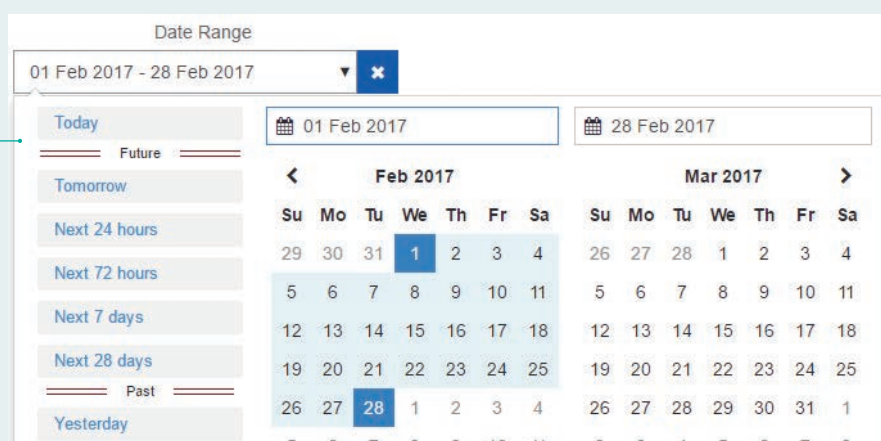


The screenshot shows a date selection interface. At the top, there's a 'Today' button and a search bar. Below the search bar, there's a calendar view for April 2017 and May 2017. The calendar shows dates from 26 to 31. The date '05 Apr 2017' is highlighted. To the left of the calendar, there's a list of date ranges: 'Today', 'Tomorrow', 'Next 24 hours', 'Next 72 hours', 'Yesterday', and 'Custom Range'. The 'Custom Range' option is selected. Below the list, 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.

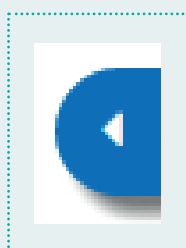


The screenshot shows a date range selection interface. At the top, there's a 'Date Range' dropdown menu. Below it, there's a search bar with the date range '01 Feb 2017 - 28 Feb 2017'. Below the search bar, there's a calendar view for February 2017 and March 2017. The calendar shows dates from 29 to 28. The date '01 Feb 2017' is highlighted. To the left of the calendar, there's a list of date ranges: 'Today', 'Tomorrow', 'Next 24 hours', 'Next 72 hours', 'Next 7 days', 'Next 28 days', and 'Yesterday'. The 'Next 28 days' option is selected. Below the list, there are 'Apply' and 'Cancel' buttons.

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

The screenshot shows a search interface with two dropdown menus labeled 'Location' and 'Ward', both set to 'All'. Below these are four buttons: 'Search' (highlighted with a red dashed box), 'Export', 'Bulk', and a lightning bolt icon.

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.

The 'FILTERING' sidebar on the right contains several filter sections, each with a dropdown menu and a 'Clear all' button. The sections are: 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), and 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 () explains that the shift has been sent to an agency and also available to bank members.

Amending bank members and shifts

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.

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

Cancel Worker - On behalf of Worker

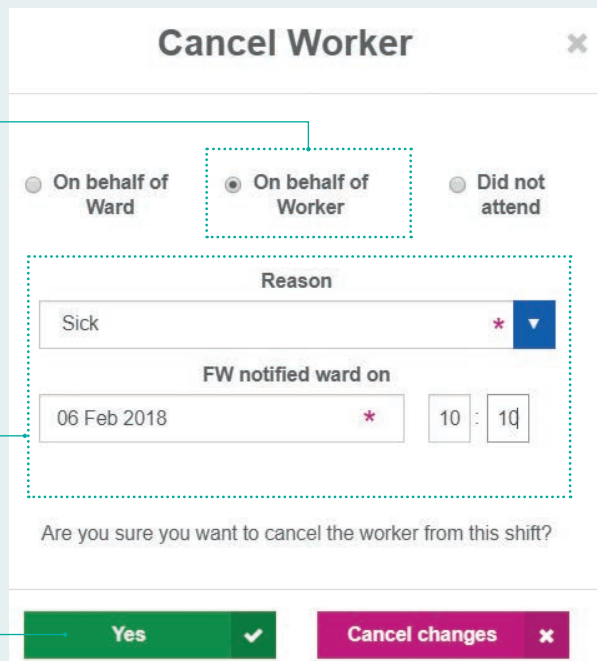
Click the  icon in the tile's header.

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.

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.



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** ✕

Cancel Worker - on behalf of Ward

When you need to cancel a shift and bank member because they are no longer required, you can do this by either clicking on the Delete icon or use the 'On behalf of Ward' option under Cancel Worker.

Cancel Worker

☒ On behalf of Ward ☐ On behalf of Worker

Reason

Covered by Ward

Flexible Worker Notified

No

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

Yes

Cancel changes

Delete Shift

Reason

Ward Requirement Change

Flexible Worker Notified

Yes

Are you sure you want to delete this Shift?

Confirm

Cancel

Once you confirm the cancellation of a shift and bank member, a pop-up notification will now appear on your dashboard with similar shifts in the same location but in different ward or department (subject to availability).

Never Cancel Bank - REALLOCATE

1) From the list of available shifts, select the shift you would like to book for the bank member. The **Book** button will turn green once selected.

2) Confirm if you have notified the bank member.

If you respond yes it will be assumed that you have already notified the bank member.

If you respond no, the bank member will automatically receive a reallocation notification via *My:Bank* which they will be required to acknowledge.

When reallocating a bank member, always think about the new location and the time taken to get to their shift as the size of the hospital can vary and it may take the bank member additional time to get to their new shift than they may have originally planned.

Never Cancel Bank - Increase shift fill

You have cancelled Sanimon Lukose from the shift. Now book Sanimon into a vacant shift below...

Ref #	Date	Start	End	Code	Location	Ward	Type	Action
90619291 @	10 Oct 2019	19:30	08:00	RN00	Basilidon Hospital	Renal Nursing	Standard	<div>Book</div>
90655008	10 Oct 2019	19:30	08:00	RN00	Basilidon Hospital	Discharge Lounge	Standard	<div>Book</div>
90655012	10 Oct 2019	19:30	08:00	RN00	Basilidon Hospital	A and E Nursing	Standard	<div>Book</div>

Flexible Worker Notified

No

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

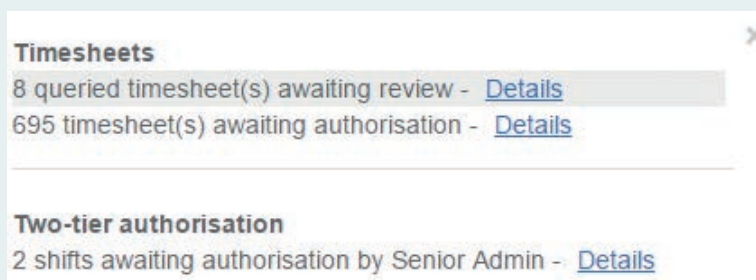
If you cancel a bank member whilst modifying the shift you will be asked the questions as shown under the **Cancel Worker** information above.

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:


The image shows a search filter section with three dropdown menus: 'Location' (set to 'All'), 'Ward' (set to 'All' with a red asterisk), and 'Range' (set to 'All'). To the right of these dropdowns is a blue 'Search' button with a magnifying glass icon.

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 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	

The image shows a modal window with a table titled 'Time Break Total'. The table has three columns: 'Time', 'Break', and 'Total'. There are two rows: 'Actual' and 'Booked'. Both rows show a start time of 07:00, an end time of 20:30, a break of 01:00, and a total of 12:30. Below the table, there are input fields for '07:00', '20:30', and 'CSW00'.

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

The image shows a 'Modify Timesheet' form. It has dropdowns for 'Location' (Training Location 1), 'Ward' (Ward Or Dept 31), and 'Worker' (FW31 Training). There are also dropdowns for 'Request reason' (Sickness), 'Code' (CSW00), and 'Shift Type' (Standard). Below these are input fields for 'Shift start' (07:00), 'Break time' (01:00), and 'Total time' (12:30). At the bottom, there are two buttons: 'Cancel changes' and '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
Booking Reason Sickness					
New to the ward <input checked="" type="checkbox"/>					
Queried <input checked="" type="checkbox"/> Details Stayed late 1 hour					
Authorised by training31					
Authorised date 17 Jan 2019					

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. If the queried timesheet needs to be amended, you can modify and authorise in the same way as above.

Notes:



Professionals

Useful Contact Information:

Service Centre is open 24/7/365

Call: **03332 407 552**

Visit: **www.nhsprofessionals.nhs.uk**

