

# 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 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.

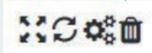
## Home tab

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.

### \*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.

### Worker -

If there are multiple workers have identical names, you will be able to identify the worker from their Staff ID.

### Shift Date:

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

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

## 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.

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

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.

## 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:**

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:

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.

## Amending bank members and shifts

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

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.

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.

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

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?

### Delete Shift

Reason: Ward Requirement Change

Flexible Worker Notified: Yes

Are you sure you want to delete this Shift?

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.

### 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	Basildon Hospital	Renal Nursing	Standard	<input type="button" value="Book"/>
90655008	10 Oct 2019	19:30	08:00	RN00	Basildon Hospital	Discharge Lounge	Standard	<input checked="" type="button" value="Book"/>
90655012	10 Oct 2019	19:30	08:00	RN00	Basildon Hospital	A and E Nursing	Standard	<input type="button" value="Book"/>

Flexible Worker Notified: No

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.

## 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.

A

**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

Modify Icon

### Modify Shift

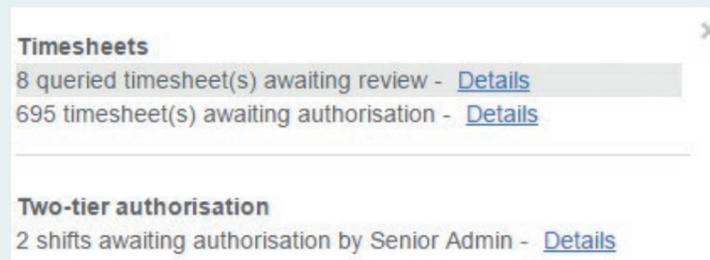
If you cancel a bank member whilst modifying the shift you will be asked the questions as shown under the **Cancel Worker** information above.

# Notifications

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



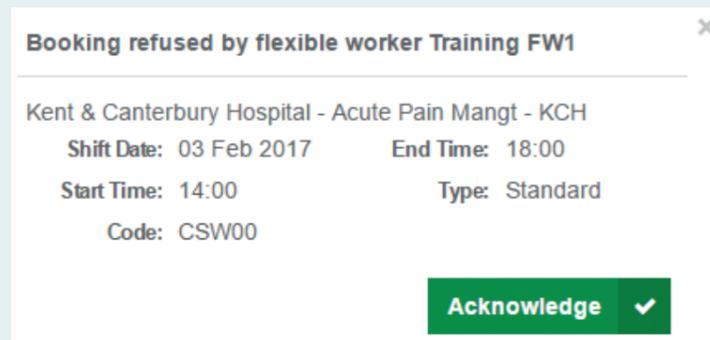
Clicking on the envelope will display the notifications. You will see a number of different options:



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.



