NHS
Greater Glasgow and Clyde

BANKSTAFF USERGUIDE

Bank Staff – User Guide

Sections in this guide are:

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2. Changing Password
3. Changing Security Question and Answer
4. Requesting a Shift
5. Authorise a Shift Request
6. Create a Block Request
7. Viewing Requests
8. Adding Preferred Staff to request
9. View/Edit Requests
10. Recall a Shift Request
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1. **Bank Staff – Logging in for the first time**

Double-click on the desktop shortcut or type in the URL into the web browser.

Enter the user name and password provided

On first login you will be asked to change your password

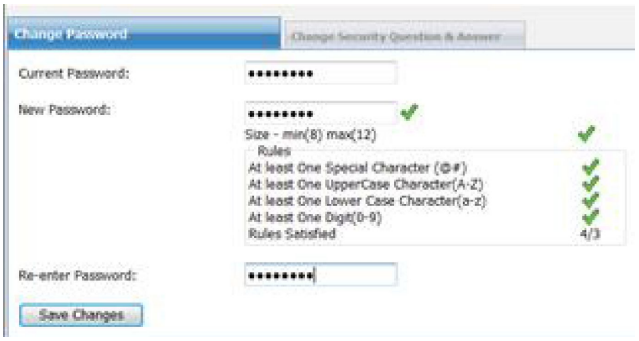
2. **Bank Staff – Changing Password**

Click on **Change Password** at the top of the screen

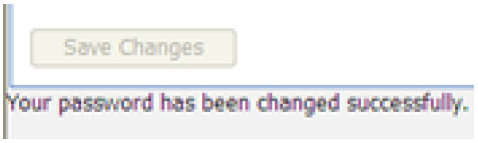
Complete the **Current Password**

In the **New Password and Re-enter Password fields** enter a new password adhering to the formatting rules

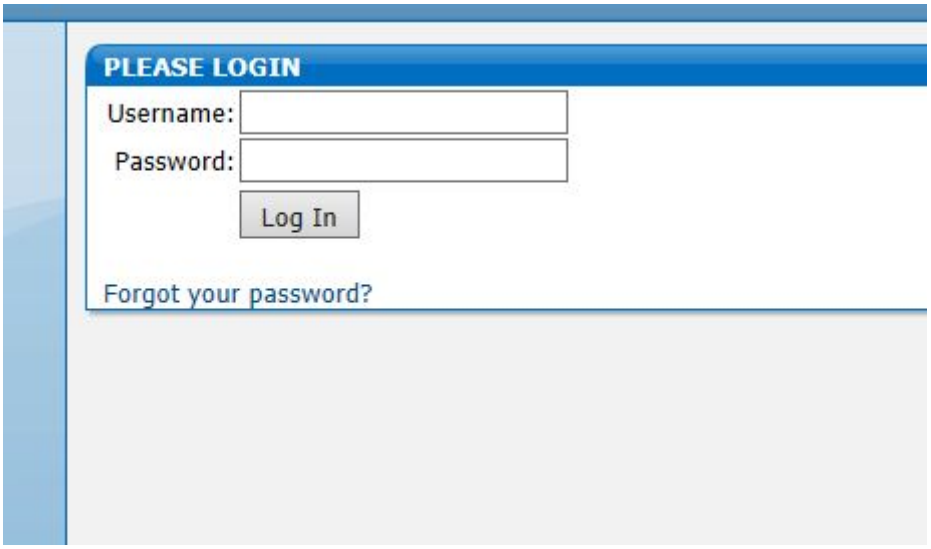
Click on **Save Changes**



A message will appear confirming your password has been changed



If you forget your password Click on **Forgot Your Password?**



Enter your **User Name**

Enter your **e-mail address**

Click on **Login**

3. **Bank Staff - Requesting a Shift**

Enter your username and password

Click on **Requests** then click on **Add Request**

All blue fields are mandatory fields

Select your allocated Ward in the **Unit** field

Select Date --/--/----

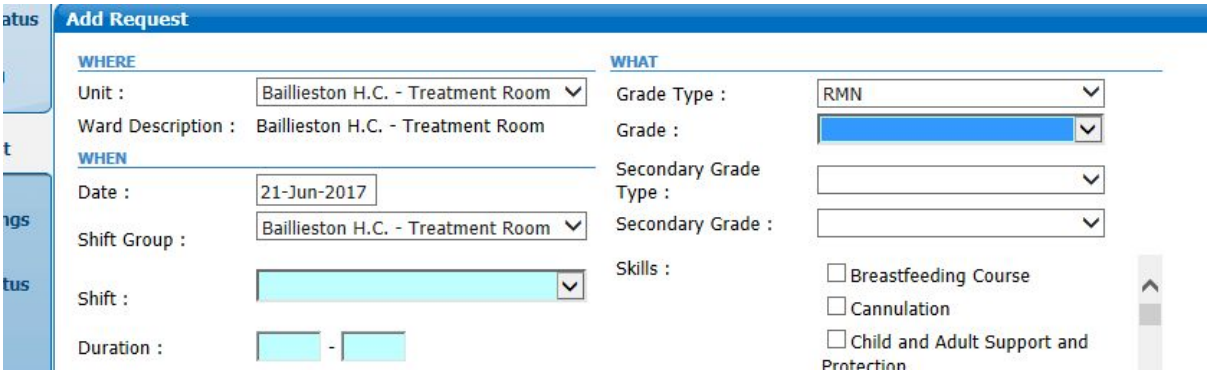
Select **Shift** required e.g. **Early**

Select **Grade Type** e.g. HCA

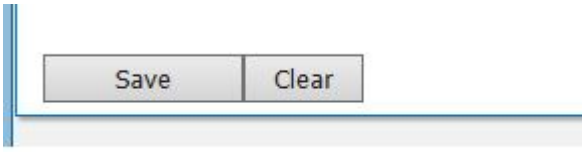
Select a name from the **Requested By** field

Enter **Request Reason**

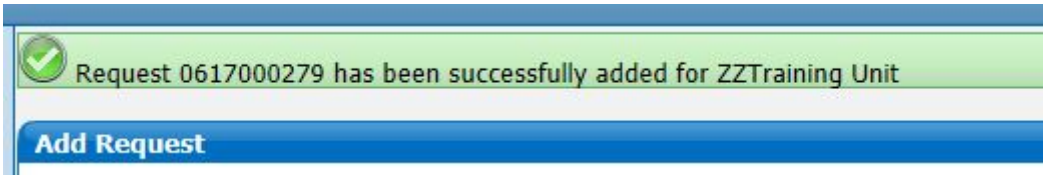
Enter **Request Method**



Click **Save**



A message will appear confirming that the Request has been added and the Shift ID number



This shift will now need to be authorised before the Bank Office Staff will be able to try and fill it.

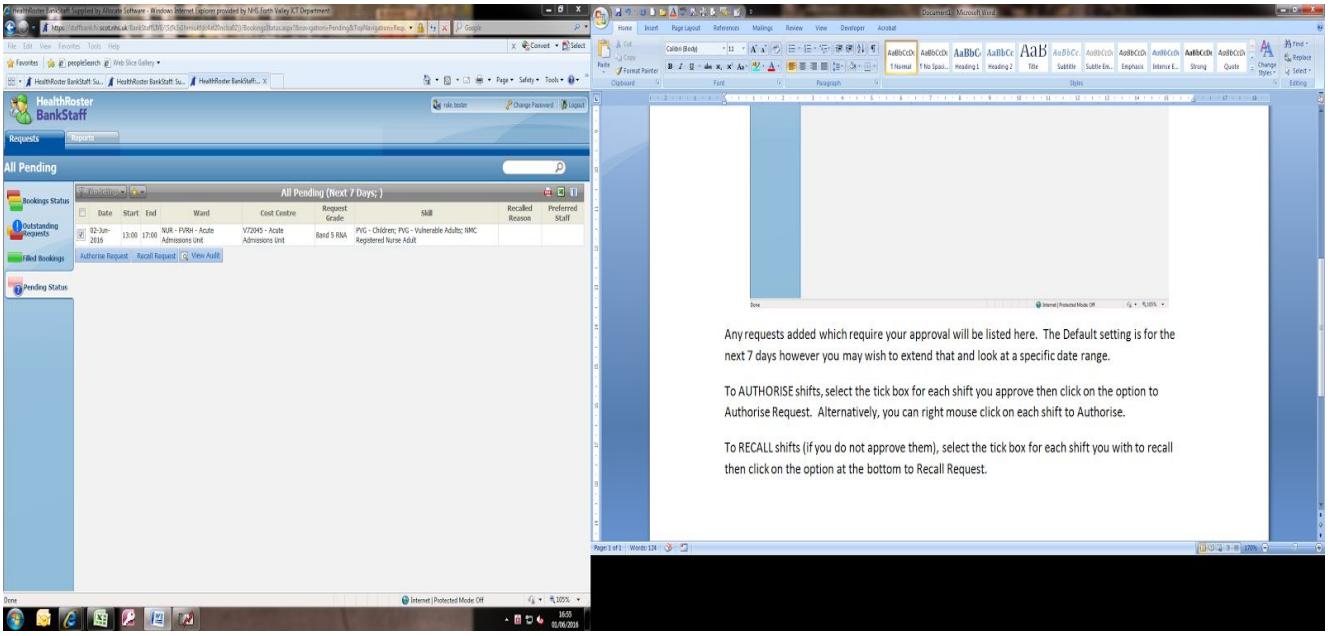
4. **Bank Staff – Authorise a Shift Request**

Click on **Requests** then **Bookings Status**

Click on **Pending Status**

Any requests added which require your approval will be listed here. The Default setting is for the next 7 days however you may wish to extend that and look at a specific date range.

To AUTHORISE shifts, select the tick box for each shift you approve then click on the option to Authorise Request. Alternatively, you can right mouse click on each shift to Authorise.



5. **Bank Staff – Create a Block Request**

Click **Requests** then **Add Request**

Select your allocated ward in the **Unit** field

Select a start date within the period of your rosters as the **Date**

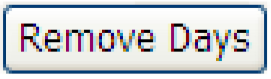
Select **Shift** e.g. Late

Tick Block?

Enter an end date as the **Until** date

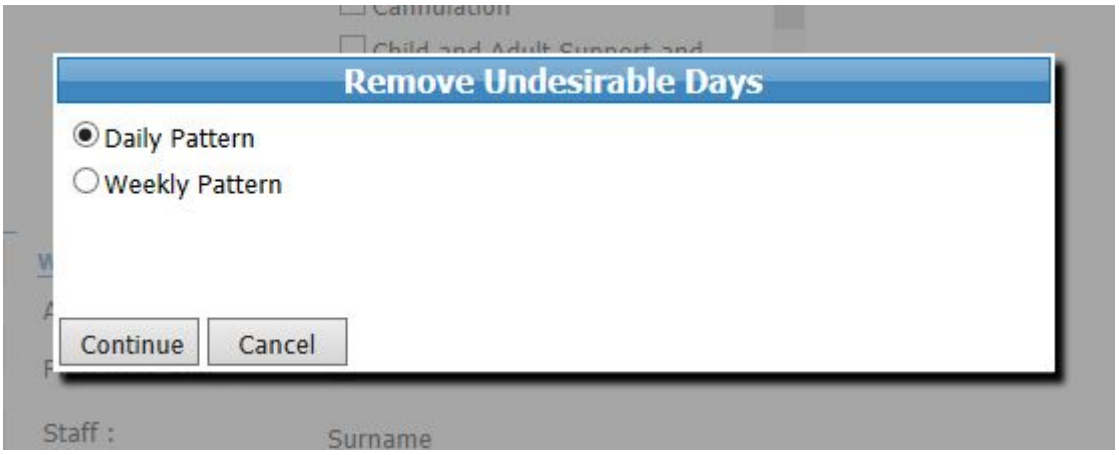
To remove any days from within the range

Click on **Remove Days**



Select Daily Pattern

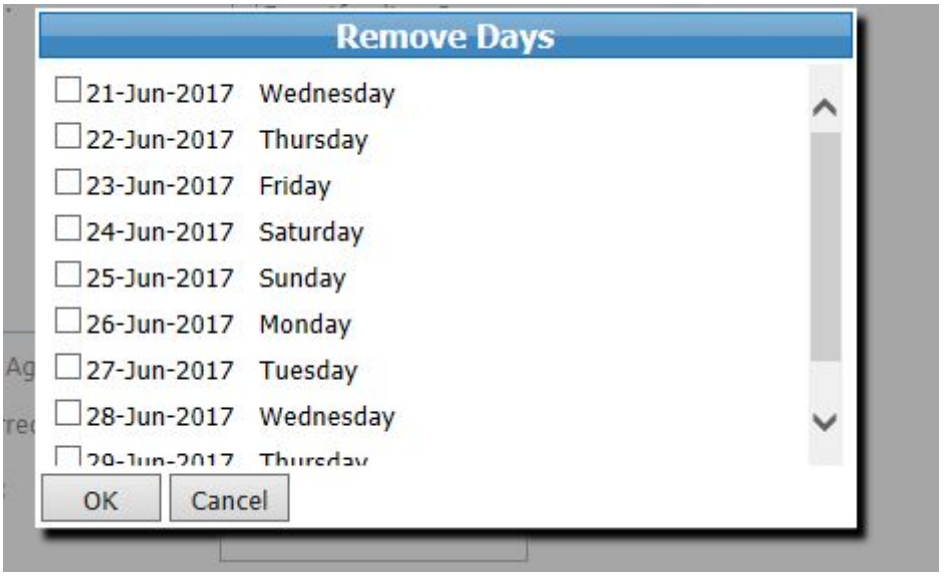
Click on **Continue**



You will be prompted to select a date from the block to be removed.

Tick the relevant date

Click on OK

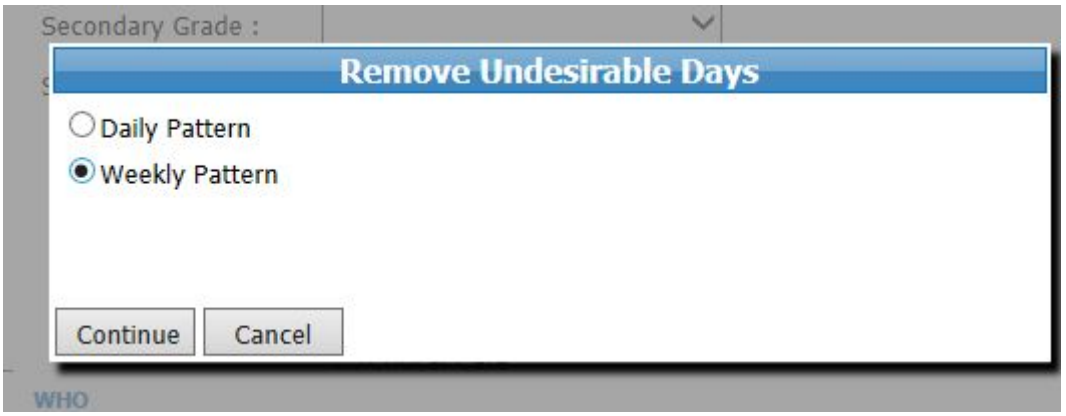


Alternatively

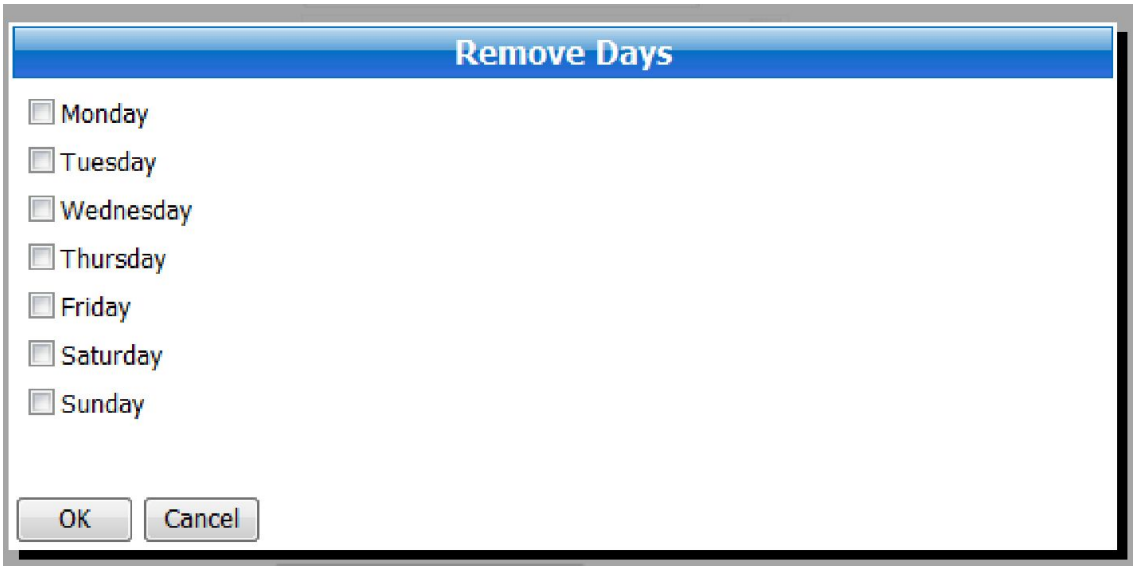
Click on **Remove Days**

Select **Weekly Pattern**

Click on **Continue**



Select to remove relevant days e.g. Tuesdays and Fridays



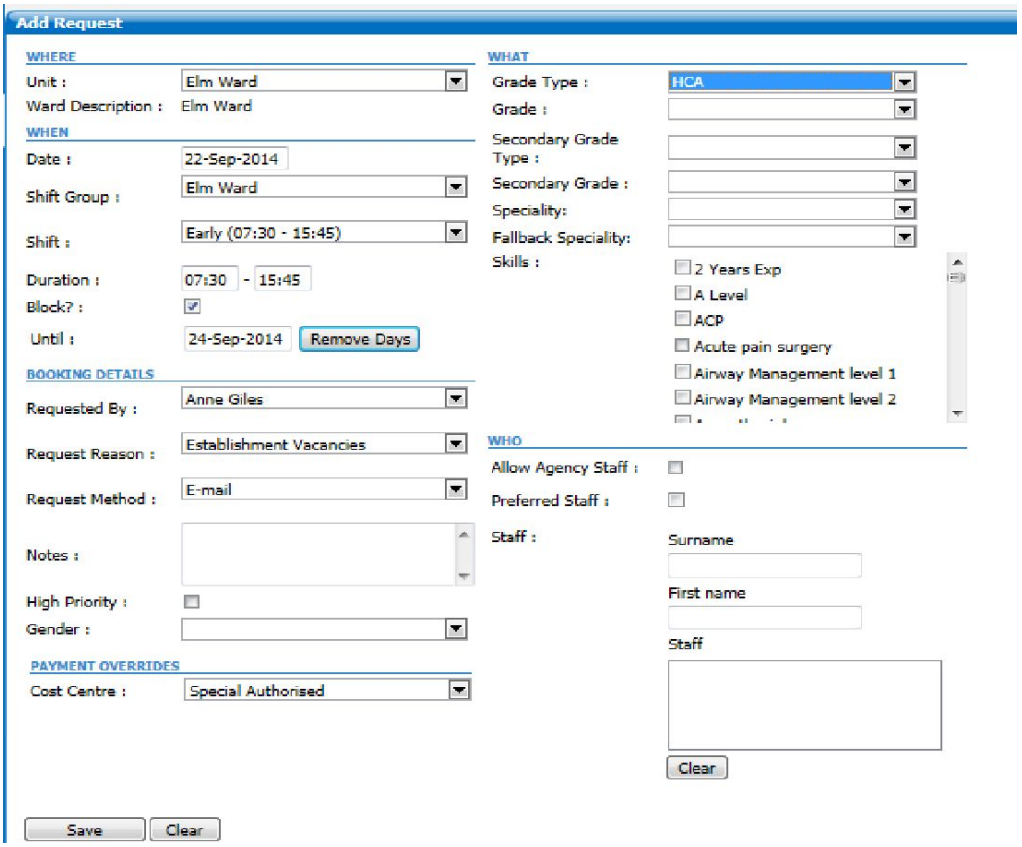
Click OK

To complete the Block Request

Selec**t Grade Type** e.g. HCA

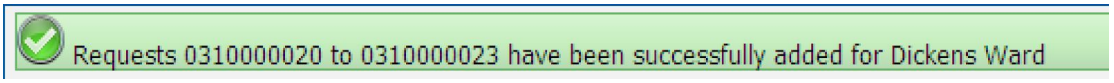
Complete all remaining mandatory fields

Click on **Save** at the bottom of the form



A message will appear at the top of the form, confirming the block request and the range of Request ID numbers.

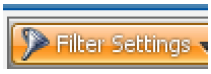
The date/s you removed from the Block will not be included.



6. **Bank Staff – Viewing Requests**

Click on **Requests** then **Bookings Status**

Click on **Filter Settings**



Select allocated Ward

Select Period Date Range

Select Start and End dates appropriate to the requests you have added

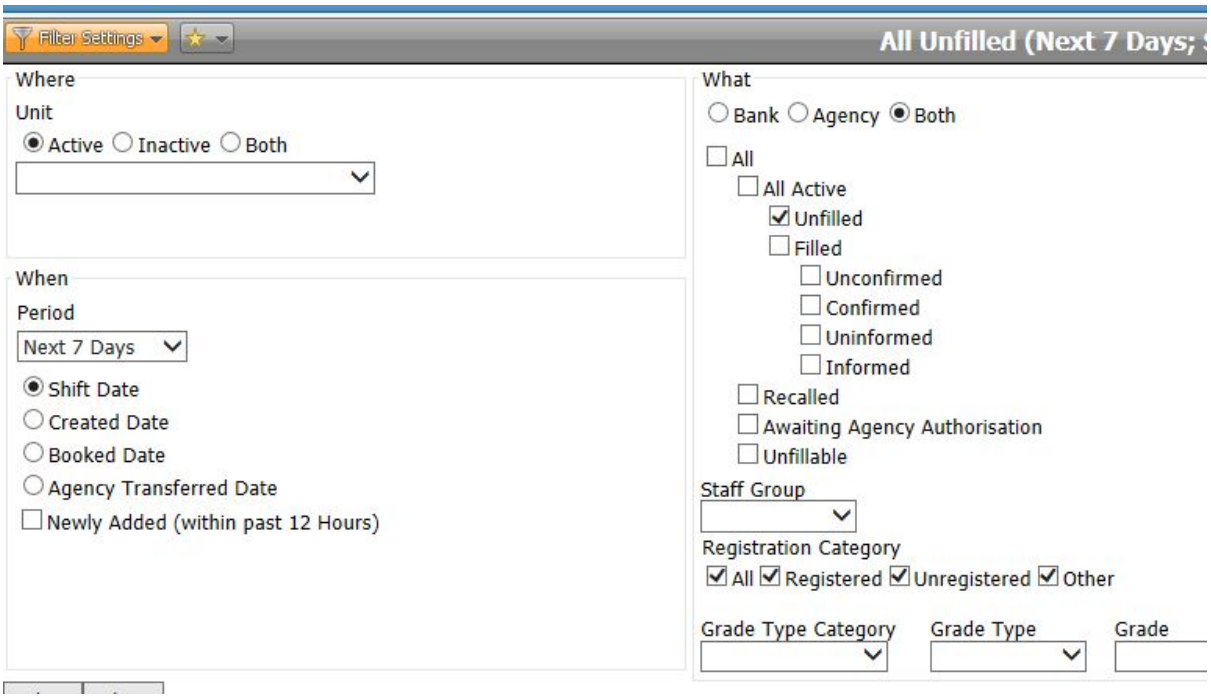
Tick Bank

Tick Unfilled

Select **Staff Group** e.g. Nursing

Select **Grade Type** e.g. HCA

Click on **Filter**



A list of matching records will be displayed

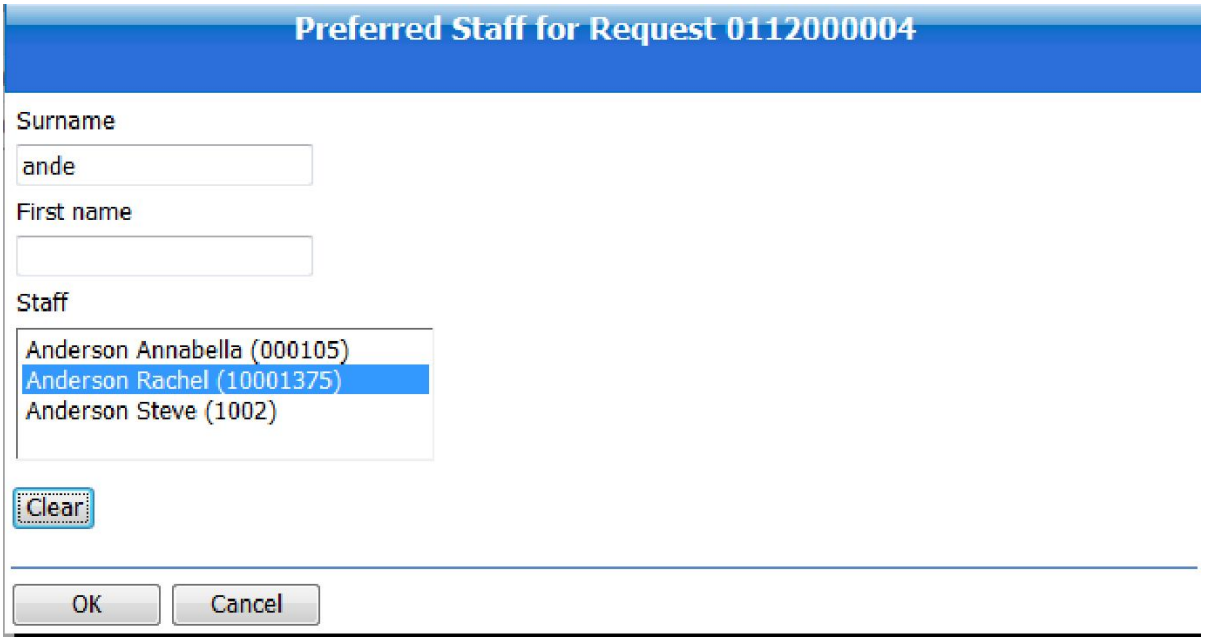
7. **Bank Staff – Adding Preferred Staff to request**

Select an Outstanding request

Click **Add Preferred Staff**

Select your designated Bank Staff member

Click OK



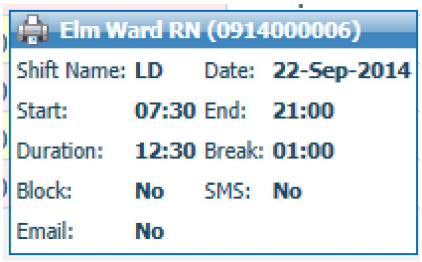
Your Preferred staff will now show next to the shift

8. **Bank Staff – View/Edit Requests**

Go to **Requests** then **Outstanding Requests**

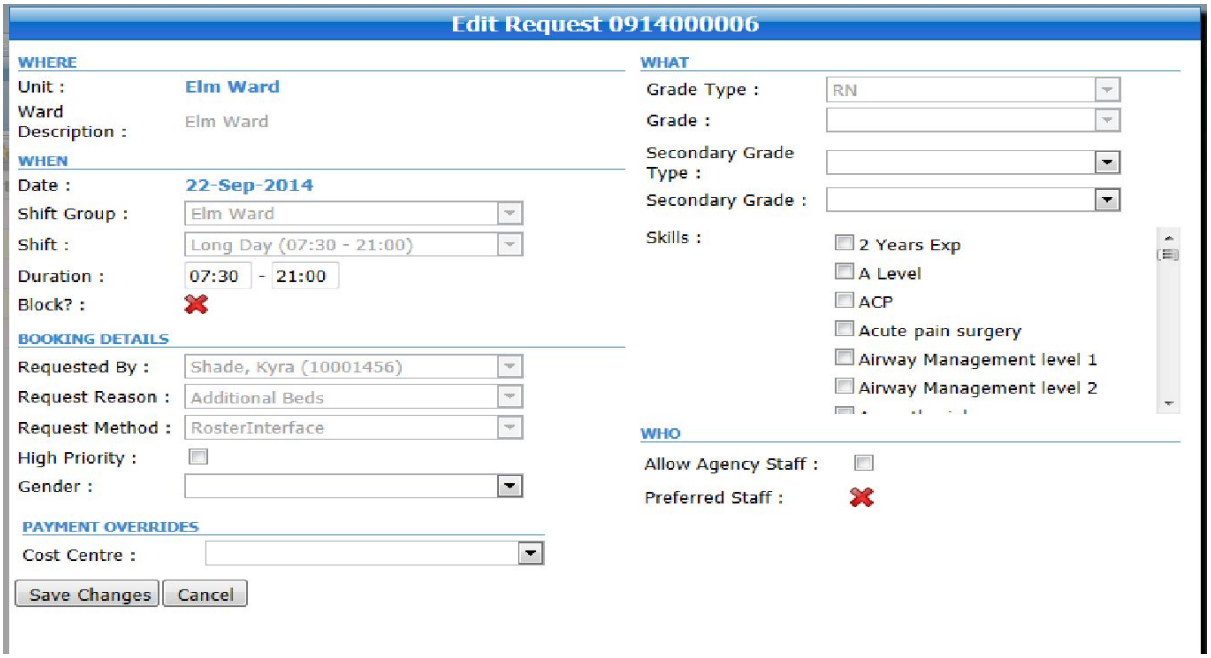
Hover over any of the Request Ids

A tooltip with information about the duty requested will be displayed



Click on a **Request Id**

An Edit Request form will appear. Note – there are limited fields that can be changed



You could change the **Duration** of the shift for example

Click on **Save Changes**

You will see that the time change has been saved simply by looking at the overview of outstanding shifts

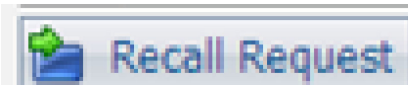
Request Id	Date	Start	End	Ward
0914000006	22-Sep-2014	07:30	22:00	Elm Ward

9. **Bank Staff – Recall a Shift Request**

Click on **Requests** then **Outstanding Requests**

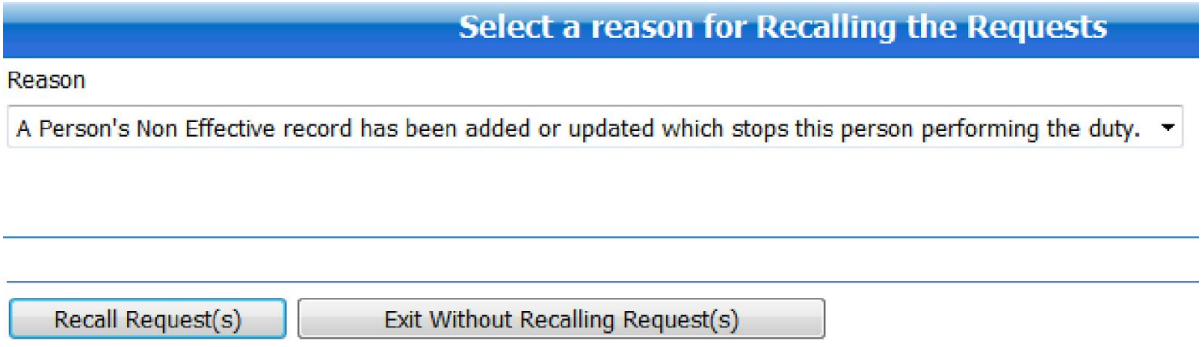
Tick the box next to the Request Id you wish to recall

Click on **Recall Request**



Select **Reason** Cancelled

Click on **Recall Request(s)**



The Request will no longer show in the list of outstanding requests

If you wanted to check the recalled shift

Click **Requests** then **Bookings Status**

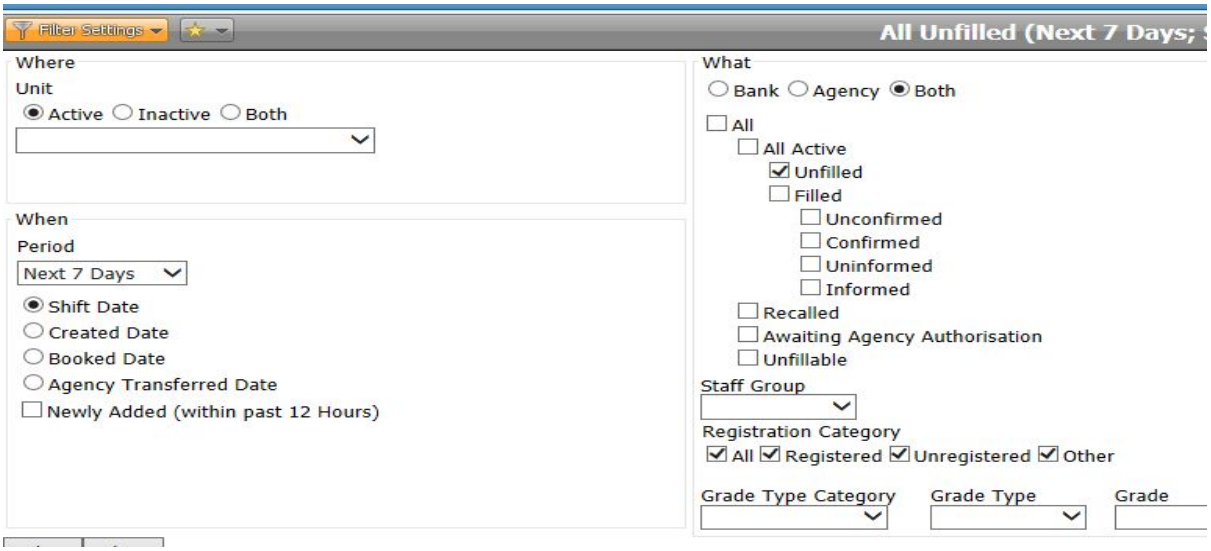
Select your allocated ward in the Unit field

Select appropriate Date Range for the Requests that you have created

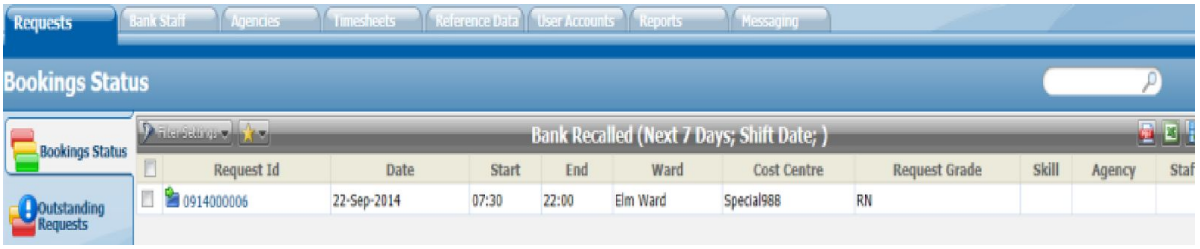
Select both **Bank and Agency**

Tick ONLY the Recalled box

Click on **Filter**



The Request you cancelled/recalled will be listed as a matching record

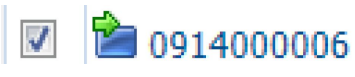


10. **Bank Staff – Reactivate a Recalled Shift Request**

Click **Requests** then **Bookings Status**

Use the Filter (as above section) to locate the Request that you previously recalled

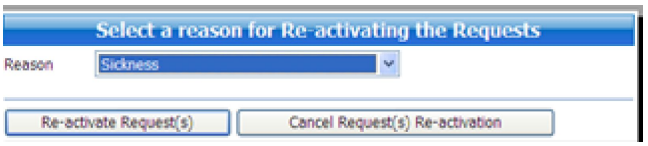
Tick the box next to the Request Id



Click on **Reactivate Request**

Select a Reason

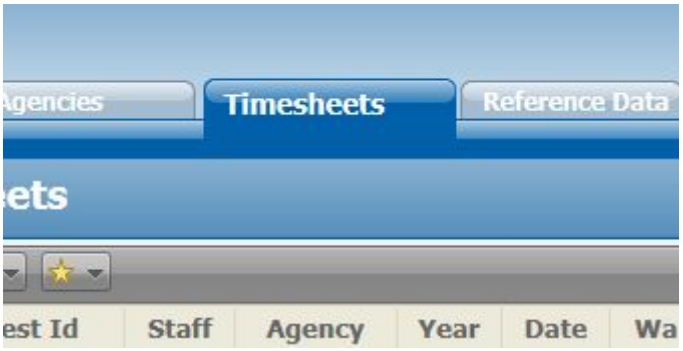
Click on **Re-activate Request(s)**



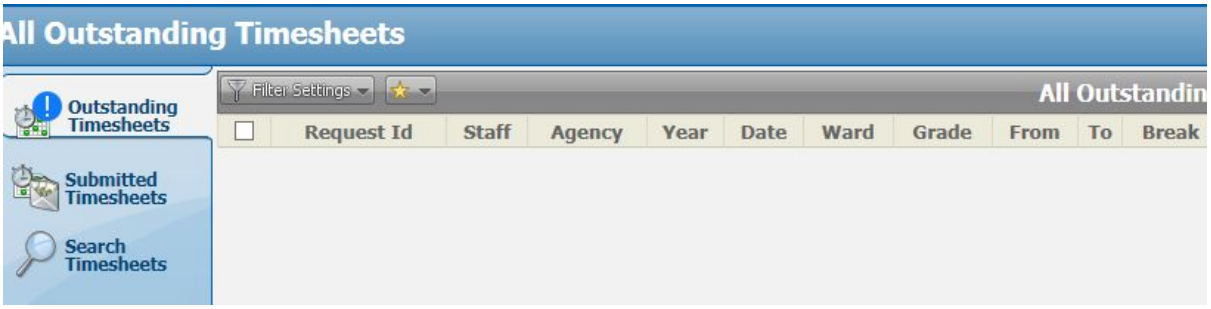
You would then amend the filter options to view the reactivated request

11. **Bank Staff – Finalizing Timesheets**

In BankStaff, go to **Timesheets** then Outstanding Timesheets

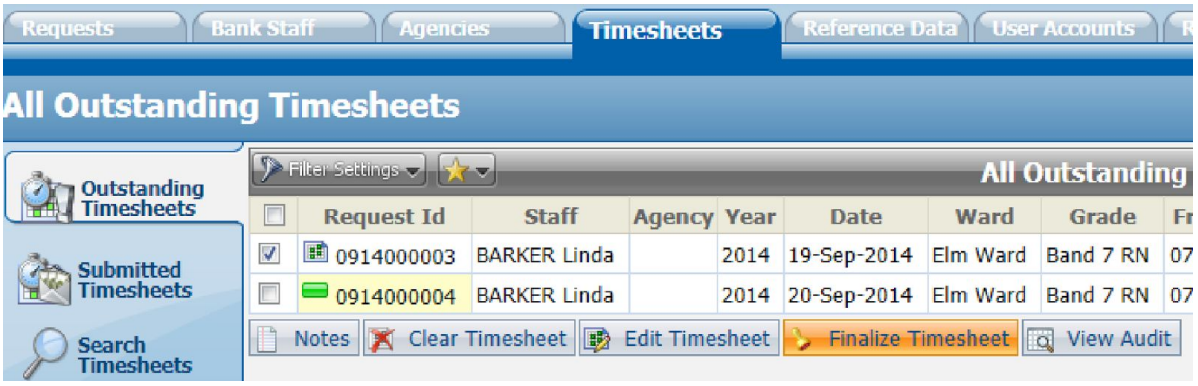


Use the filter to navigate to all worked bookings (historical) for the current period



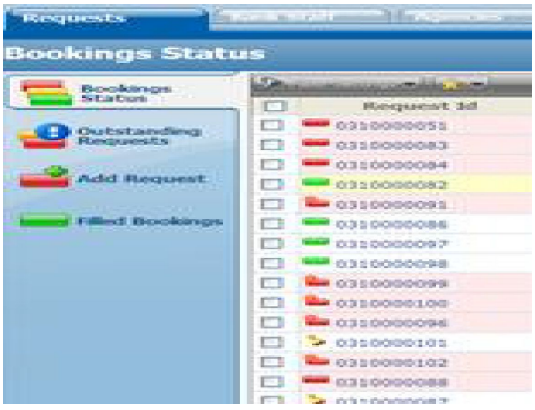
Select a timesheeted booking

Click on **Finalize Timesheet**



The booking will disappear from the list of Outstanding Timesheets

Go to **Requests** then **Bookings Status**

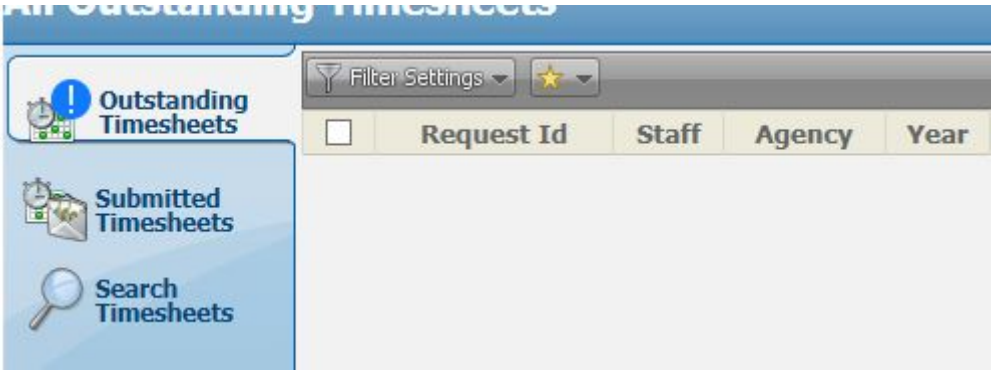


Use the filter to navigate to the appropriate period

The finalized worked booking will be displayed with the appropriate icon

12a. Bank Staff – Adding Timesheets

s
Select Outstanding worked booking



Select Add Timesheet

The form that appears allows you to edit the booking to reflect the true details

Change the start and end times if required

Select Reason **As Per Timesheet**

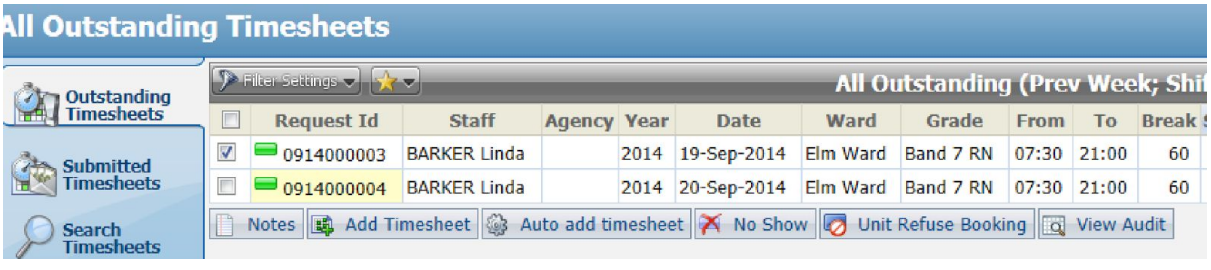
Note - you could also finalise (for payroll) at this point

Click on **Save Changes**

The Request will disappear from the list

You can also Auto Add a Timesheet

Click on **Add Auto Timesheet**



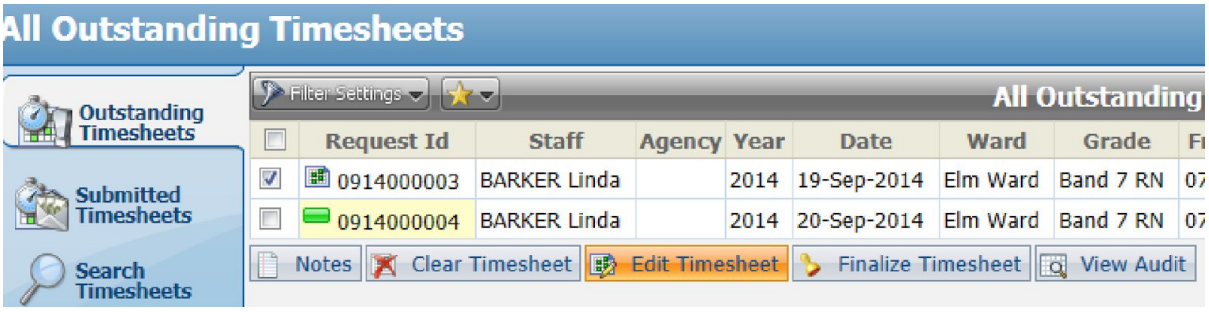
The timesheet icon will be displayed

The booking has been confirmed and time-sheeted automatically, assuming that there was no variation to the standard shift times etc.

12b. Bank Staff – Edit Timesheet

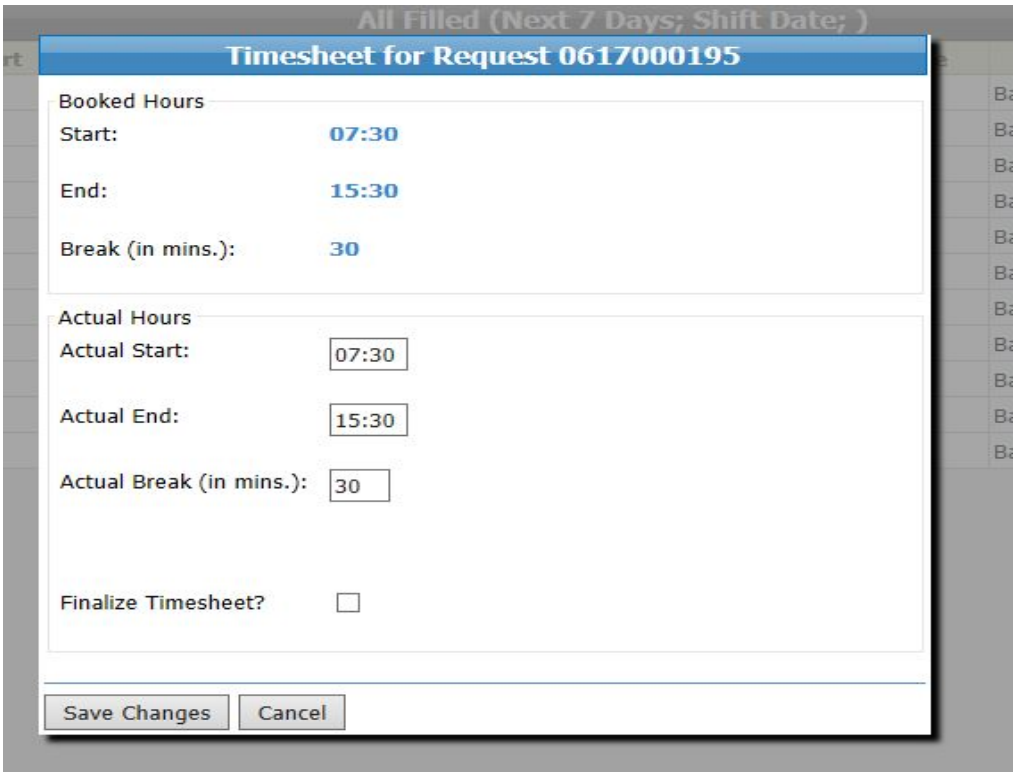
Select a timesheeted worked booking

Select **Edit Timesheet**



Change the times

Click on **Save Changes**

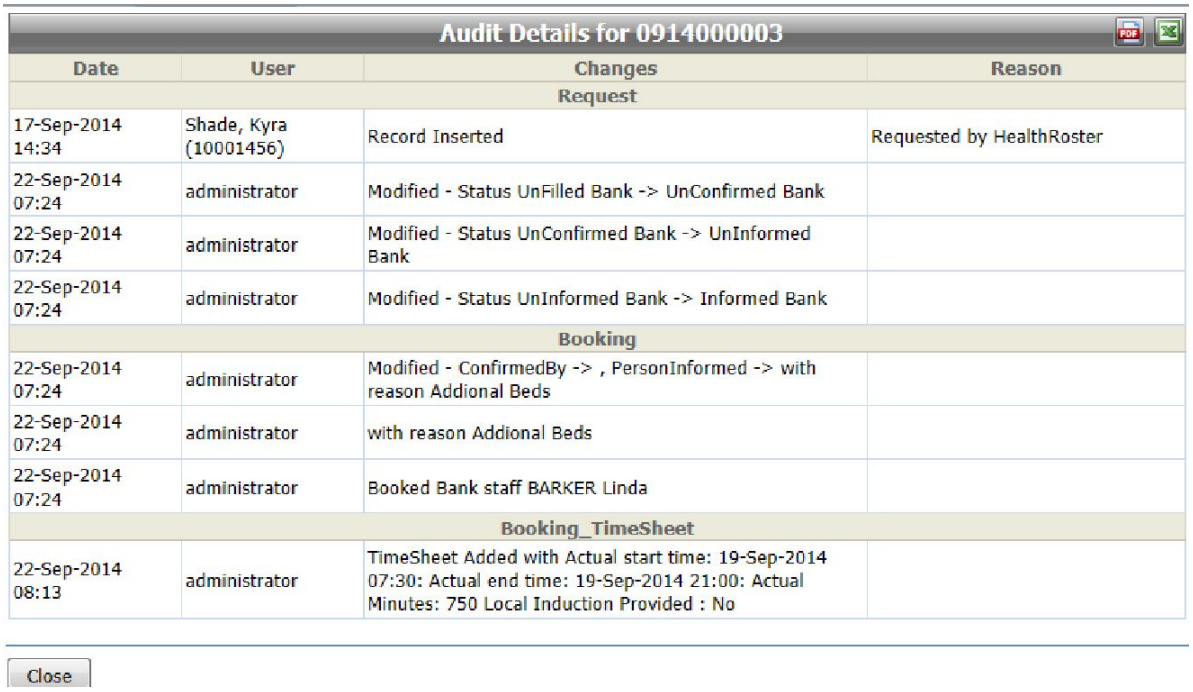


The changed times should show in the main screen

12c. Bank Staff – Timesheet Audit

Select a timesheet

Click on **View Audit**

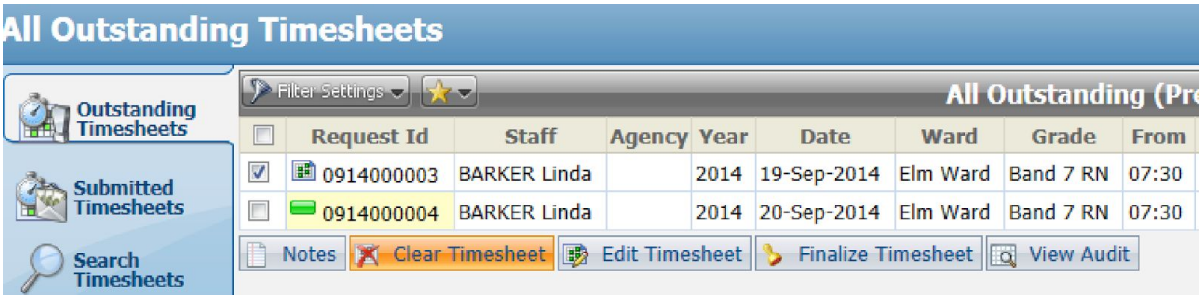


An audit trail of activities for this request will appear

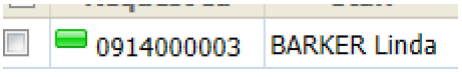
12d. Bank Staff – Clear Timesheet

Select a timesheeted worked booking

Click on **Clear Timesheet**

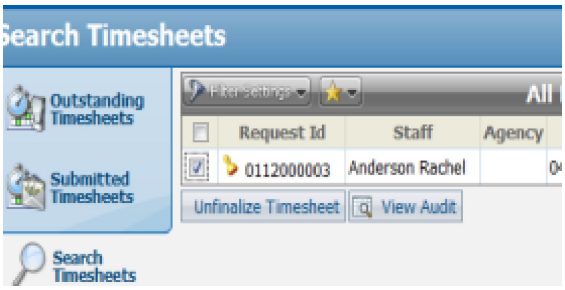


The timesheet icon will be removed from the booking

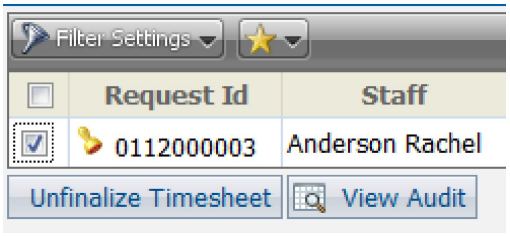


12e. Bank Staff – Unlock Timesheet

Select a finalised timesheet booking



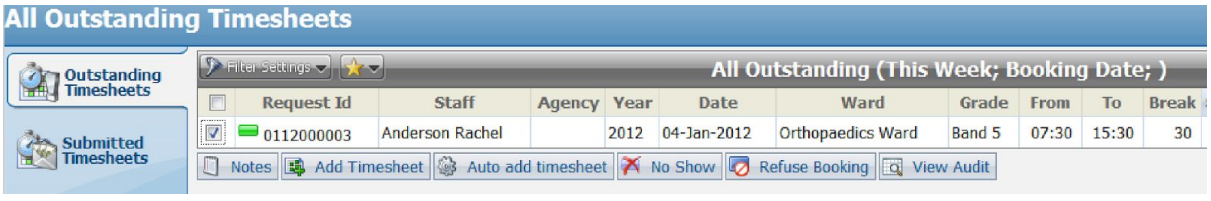
Click on **Unfinalize Timesheet**



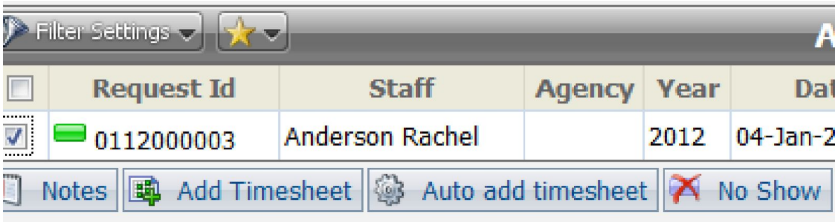
The Finalised icon will disappear from the Request ID

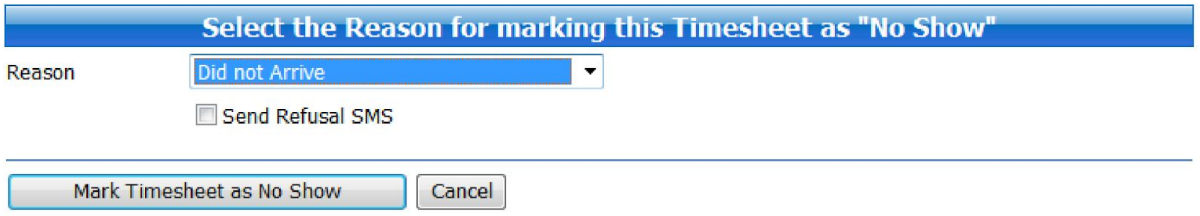
12. **Bank Staff – No Show**

From the Outstanding Timesheet view, select a request for your ward



Click on **No Show**



Select the reason **of Did Not Arrive**

Click on **Mark Timesheet as No Show**