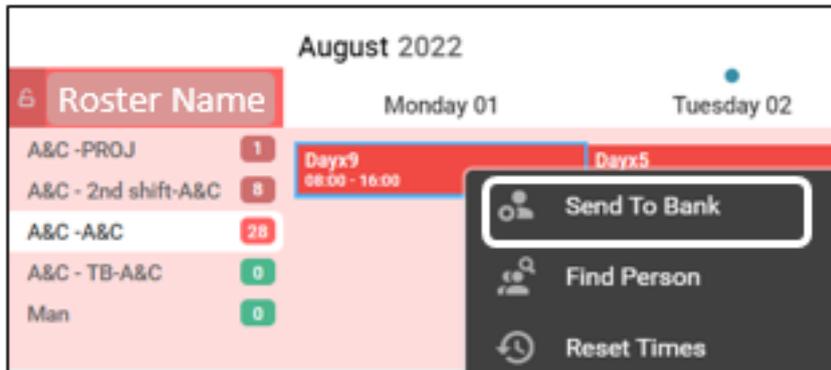# Sending shift(s) to Bank, Approving, Assigning and Finalising

Select the shift(s) you need to send to Bank, right click, "Send To Bank":

Fill in the details required, the red * sections are the only fields that are mandatory.

You can type into these fields to locate the required grade. You can also input a "Fallback Grade" at this stage, e.g., Band 4 NA (Nursing Associate) if appropriate:

If there are more than 1x vacant duties on the selected day, ensure you only send to bank the amount you require. If you wish to send the whole stack to bank, you can use ▬ to select all:

With the implementation of Loop, we have updated the "Preferred Person" section, where you can name one individual against a shift.

If you have a particular staff member agreed to work a shift and you name them here, it will prevent the shift being visible to any other staff member within the available bank duties section in Loop, only showing to the named individual as available for them to book into:

The shift will then show in the vacant duties section on HealthRoster as below:

- The grey person icon with a "?" means that the shift requires approval
- If required, you can also adjust the shift times at this stage

The person with Bank Approval rights for your roster will see the "Approve Temp Staff Request" option when they right click on this shift:
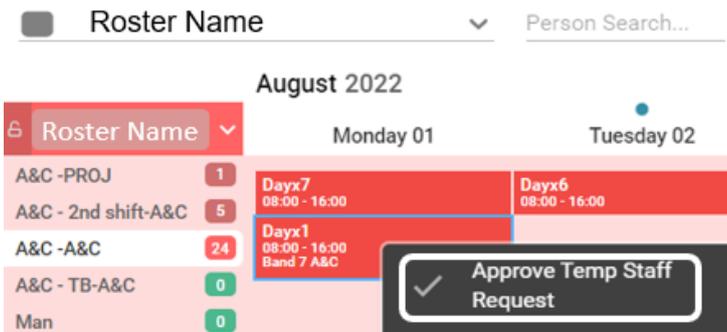
If you are sending to bank and also have the permissions to approve, you can also tick the "Approve Temp Staff Request" tick box at the bottom of the Bank Requirements window:
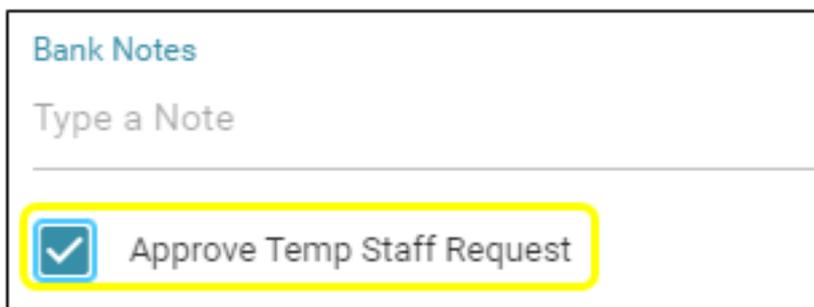
Which will then change the shift to approved, and show as below:
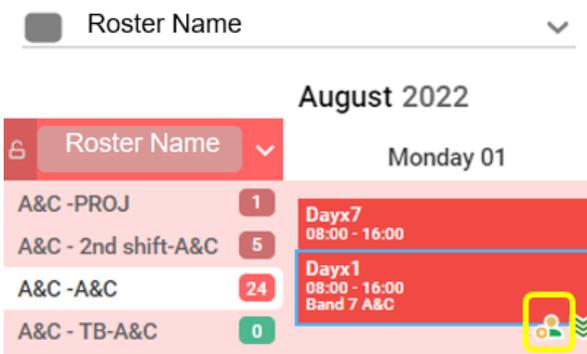
Now the shift is approved, it will initially show as available to book into to staff with a bank posting for the required grade only. Three weeks (21 days)

prior to the shift date, this will become available to the fallback grade as well, within their "Available Bank Duties" section in Loop.

If you already have someone to fill the shift, you can right click and select "Find Person":

- The staff member will be paid based on the posting the shift is assigned to - always ensure the correct bank posting is selected at this stage.
- If you have a nominated Preferred Person you can still assign at this stage should you wish.
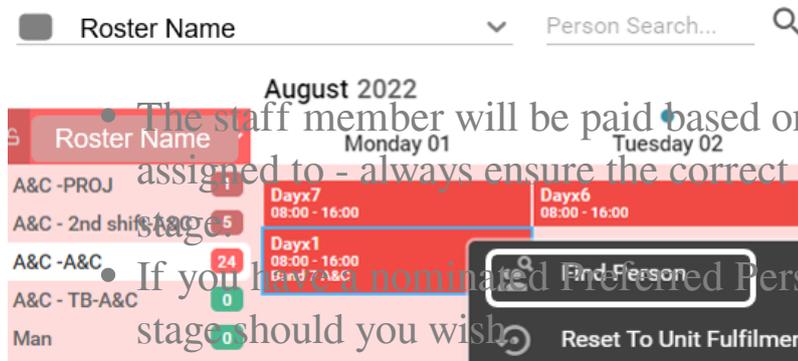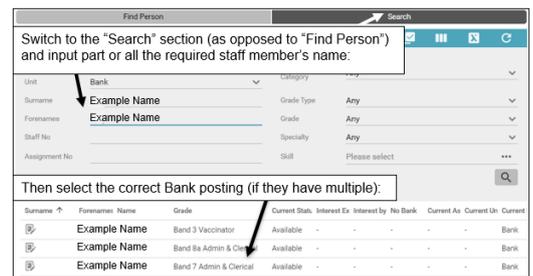
Click "Assign Candidate Confirmed" in the top right of the window that pops up when the posting is selected, and close any remaining windows:

The shift will then be assigned and show on the roster:

- Example above shows a padlock with a blue dot, which indicates the shift has also been uploaded to Payroll & should be paid in the relevant payslip. However, if there is no "blue dot" it does not necessarily mean the shift was not paid. Please also check the audit trail on the shift to check whether this shift shows as submitted then unlocked/relocked.

Once the shift has been worked, you must finalise in time for the weekly upload to Payroll which happens every Friday, uploading shifts from the previous Thursday to the Wednesday of the current week, paid the following Friday.
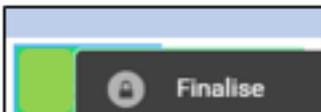
Closing notes:

- Previous weeks will also be included in a "sweep" each upload, for example:

Upload	Upload	Upload	Upload	Paid	Next Upload Date
Week 1	Week 2	Week 3	Date	Date	03/01/2025
03/01/2025			Upload date		
12/12/24	18/12/24		Oldest date (Wk1) that shifts will be uploaded		
19/12/24	25/12/24		Wk2 where shifts will be uploaded		
26/12/24	01/01/25		Latest date (Wk3) shifts will be uploaded to		
10/01/2025			Date shift will be paid, provided it is uploaded		

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
December	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	09/12/24	10/12/24	11/12/24	12/12/24	13/12/24	14/12/24	15/12/24
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	16/12/24	17/12/24	18/12/24	19/12/24	20/12/24	21/12/24	22/12/24
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	23/12/24	24/12/24	25/12/24	26/12/24	27/12/24	28/12/24	29/12/24
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	30/12/24	31/12/24	01/01/25	02/01/25	03/01/25	04/01/25	05/01/25

- However once a shift falls outside the "oldest" dates, it will not be uploaded from the system and can only be paid via payroll's adjustment form to manually process payment.
- You can select multiple shifts to send to bank (or approve or assign to person) by either holding down the Ctrl key on your keyboard and selecting individually, or by using the multi select button on the roster screen:

Roster Name   ⌄   Person Search...   Q   [✓]

While active this function will show blue: [✓]

- You can update Requirements at any point before the shift is assigned to an individual by right clicking on the shift and selecting Edit Bank Requirements:

✏ Edit Bank Requirements

- You can also use Reset to Unit Fulfilment if the shift is to be worked substantively instead.

↺ Reset To Unit Fulfilment

- You should avoid assigning bank to substantive members of the team

who show as not having fulfilled their contracted hours i.e., a positive balance showing in their net hours highlighted either yellow or red.

- Any requirement for **Agency** staffing, must be processed by the **KernowFlex team**, with the necessary authorisation.

Online URL: https://elearning.cornwall.nhs.uk/site/kb/article.php?id=441