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:

Required Grade *					
Band 5 RN	~				
Fallback Grade					
Band 4 NA	~				

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 \square to select all:

Send	To Bank						
Sele	cted Unit	Fulfilment	Duties (Se	nding 1/	9 duties to Bank)		Additional Request Information
		Requirem	E Location	Shift	Date ↓	Required G/GT/GTC	Bank Unit *
		A&C	-	Day	01/08/2022	A&C	Bank
Cala	at a hi	ft/a) aa		Dan	01/08/2022	A&C	Request Reason *
Sele	ect shi	n(s) as	require	a	01/08/2022	A&C	Extra Activity/Project
		A&C	-	Day	01/08/2022	A&C	Gender -
		A&C	-	Day	01/08/2022	A&C	Required Grade *
		A&C	-	Day	01/08/2022	A&C	Band 7 A&C

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:

Preferred Person

Nominate Preferred Person	***
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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:

Bank Notes	
Type a Note	
Approve Temp Staff Request	

Which will then change the shift to approved, and show as below:

Roster Nan	ne	~
		August 2022
6 Roster Name	•	Monday 01
A&C -PROJ	1	Dayx7
A&C - 2nd shift-A&C	5	08:00 - 16:00
A&C -A&C	24	Dayx1 08:00 - 16:00 Band 7 A&C
A&C - TB-A&C	0	&_ ≱

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":

	Find Perso	n			~	Search			
Switch t and inpu	o the "Search" ut part or all the	section (as oppos required staff me	sed to "F ember's	ind Pe	erson") :) 🗹	III	X	G
Unit	Bank	~	Category						~
Surname	Example Name		Grade Type		Any				~
Forenames Example Name			Grade	1	Any				\sim
Staff No			Specialty	1	Any				\sim
Assignment N	o		Skill	F	Please sele	ct			••••
Then se	elect the correct	Bank posting (if	they hav	e mul	tiple):]	0		Q
Sumame 1	Evample Name	Grade Read 2 Vaccinator	Available	interest Ex	c interest by	NO Dank	Current As	Current on	Darok
e7 197	Example Name	Band Sa Admin & Clenter	Available						Bank
-	Evennie Neme	Den d 7 Adenia A Circleri	Aver Table						

Roster Name	✓ Person Search	Q
August 20 Roster Name Shaff mem Asc-PRoj assigned to - al	22 ber will be paid base day 01 ways ensure the corr	d on the posting the shift is ect bank posting is selected at this
A&C - 2nd shistan	Dayx6 08:00 - 16:00	
A&C - A&C If you here a constraint of the constr	ominated Prefesered	Person you can still assign at this
Man stagoshould yo)UWISb Reset To Unit Ful	filment

Click "Assign Candidate Confirmed" in the top right of the window that pops up when the posting is selected, and close any remaining windows:

Assign Candidate Confirmed

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 Date 03/01/20			
03/01	/2025	Upload da	ate				
12/12/24	18/12/24	Oldest da	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 pa	aid, provid	led it is uploaded		

	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
'n	Mon	Tue	Wed	Thu	Fri	Sat	Sun
nbe	16/12/24	17/12/24	18/12/24	19/12/24	20/12/24	21/12/24	22/12/24
Decer	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:

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Roster Name

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





Person Search...

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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: <u>https://elearning.cornwall.nhs.uk/site/kb/article.php?id=441</u>