Bank Request Process



Right click on the shift you require to be filled by a Bank worker, and select 'Send to Bank'

You will now need to fill in all 3 mandatory orange ** on the right hand side in the send to bank pop up box (detailed below). Please note, one shift only will be highlighted on the left hand side, if you require multiple shifts to be sent to bank then you will need to select these using the tick boxes.

| Send To Bar | ık | | | | ⊗ |
|-------------|---------------------------|-------------|-----------------|--|---|
| Selected U | nit Fulfilment Duties (Se | nding 1/2 o | luties to Bank) | Additional Request Information (Applies to 1 highlighted duty) | |
| | Requirement Locatio | n Shift | Date | Bank Unit * | |
| | Registered - | Late | 10/03/2021 | Corporate Bench 1 | ~ |
| | Registered - | Late | 10/03/2021 | Request Reason * Establishment Vacancies | ~ |
| | | | | Gender - | ~ |
| | | | | Required Grade * RN Band 5 | ~ |
| | | | | Fallback Grade | ~ |
| | | | | Cost Centre - | ~ |
| | | | | Required Specialty - | ~ |
| | | | | Fallback Specialty | ~ |
| | | | | Preferred Person Nominate Preferred Person | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | Cancel OK | |

When requesting shifts to be sent to Bank, the 'Bank Unit' should <u>always</u> be 'Corporate Bench 1' It is also important to select the correct 'Required Grade' so for example for an HCA Band 2 you would need to select HCA Band 2, and for an Admin and Clerical Worker you would select A&C followed by their grade (e.g. A&C Band 2) If this is not done correctly, the shifts will not be advertised to the correct staff group and may not be filled.

Once you have filled the boxes in above and clicked 'Ok' the shift will then be sent to Bank. You can check this has been done correctly if a little green person appears in the corner of the shift:

| Lx1 | |
|------------------|----------|
| Lx1 RN Band 5 | •~ |
| | <u> </u> |
| DO | |
| | |

If you have a specific worker you require to be booked on to a shift, you can do this once the shift has been sent to Bank by following the below instructions.

 Wednesday 10
 Thursday 11

 Ed
 Ed

 Image: Send To Agency
 Change In Charge

 Edit Bank Requirements
 Change In Charge

 Split Demand
 Copy Demand

Right click on the shift that has been sent to Bank and select 'Find Person':

In the next pop up box you will need to select search tab and then select the Unit as 'Corporate Bench 1', then type the person's surname and first initial in the corresponding boxes below and click the spy glass

| Find Pers | on | | | | | | | | | | | | | | | | | ⊗ |
|--------------|---------------------|----------|----------|-------|----------|-------|-------|------------|---------------|----------|-------------|---------------|------------|------------|--------|-------------|-------|--------|
| Vacant D | uties | | | | | | | | | | | | | | 2 | | X | G |
| \checkmark | Resourcing Org Unit | Activity | Activity | Shift | Interest | Start | End | Valid Date | Location | Opt. | Grade | Required Gra. | . Block ID | | | | | |
| Solution | Corporate Bench 1 | | - | L | - | 15:30 | 21:00 | 10/03/202 | n - | - | RN | RN Band 5 | - | | | | | |
| | Find Person | | | | | | | | | | | | Search | 1 | | | | |
| Search | | | | | | | | | | | | | | 91 Records | \leq | | X | G |
| 0, | | | | | | | | | | | | | | | | | | < > |
| Workers | Temp | O Subs | | | | | | | Grade Type | | Any | | | | | | | ~ |
| Unit | Corporate B | ench 1 | | | | | | \sim | Category | | | | | | | | | |
| Surname | smith | | | | | | | | Grade Type | | Any | | | | | | | ~ |
| Forenames | 3 | | | | | | | | Grade | | Any | | | | | | | \sim |
| Staff No | | | | | | | | | Specialty | | Any | | | | | | | \sim |
| Skill | Please sele | rt | | | | | | | | | | | | | | | | Q |
| | | | | | | | | / | | | | | | | | | | |
| Surname 个 | Forenames | Name | | Gra | ade | | | Current St | atus Interest | . Intere | est No Bank | Current Assig | Inment | | Curren | t Unavailab | ility | Curre |

Once you locate your worker in the list below, select their name so that it is highlighted in blue and click 'assign candidate confirmed' in the top right hand corner of the box

| Find Person | Posting | | | | | | | |
|--|---------------------------------------|--|-----|--|--|--|--|--|
| Vacant Duties Resourcing Org Unit Activity Activity Shift Interest S Corporate Bench 1 L - 11 | Xena Bloggs A&C Band 7 | Sank Yes < Assign Candidate Confirmed Unit Mitchinsons Manager < Staff No Xena_Bloggs Assign Candidate Unconfirmed From Unknown More | Pa: | | | | | |
| | Candidate Details Warning | Warnings & Violations | | | | | | |
| Find Person | Overlapping Assignments > Skills > | Jobal Matching Grade Rule The person's Grade (A&C Band 2) doesn't match the required Grade (RN Band 5) | | | | | | |
| Search | Contacts > | | | | | | | |
| Workers Temp Subs | Availability > Unit Preferences > | | | | | | | |
| Sumare bloggs | | | | | | | | |
| Forenames | | | | | | | | |
| Skill Please select | | | | | | | | |
| Surname ↑ Forenames Name Grade Current Sta Interest | | | | | | | | |
| Image: Book of the Book of | | | | | | | | |
| Bloggs Anthony Anthony Bloggs A&C Band 3 Available - | | | | | | | | |
| By Bloggs Anthony Anthony Bloggs RN Band 5 Available - | | | | | | | | |
| B Bloggs Xena Xena Bloggs A&C Band 2 Available | | | | | | | | |
| Bloggs Xena Xena Bloggs A&C Band 5 Available - | | | | | | | | |
| Bioggs Idny Tony Bloggs RN Band 5 Available - | | | | | | | | |
| Dougus cirza Eirza bioggs Ado Band 2 Available - 4 | | | | | | | | |

Once you have completed this, you can close the boxes shown and your worker will then appear at the bottom of the roster under 'Bank & Agency' and you will be able to check their hours and lock them down as normal.