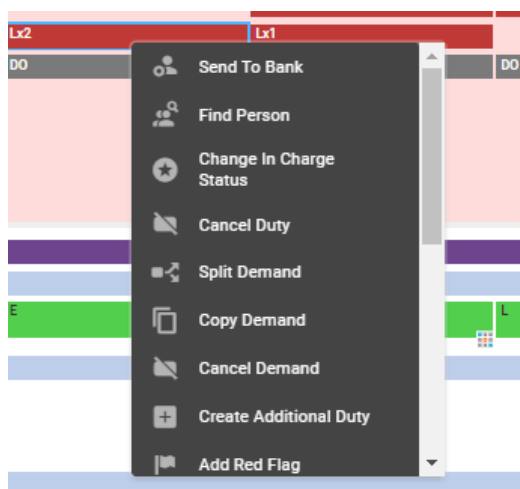


Bank Request Process

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 Bank
✕

Selected Unit Fulfilment Duties (Sending 1/2 duties to Bank)

	Requirement	Location	Shift	Date
<input checked="" type="checkbox"/>	Registered	-	Late	10/03/2021
<input type="checkbox"/>	Registered	-	Late	10/03/2021

Additional Request Information (Applies to 1 highlighted duty)

Bank Unit *
Corporate Bench 1

Request Reason *
Establishment Vacancies

Gender
-

Required Grade *
RN Band 5

Fallback Grade
-

Cost Centre
-

Required Specialty
-

Fallback Specialty
-

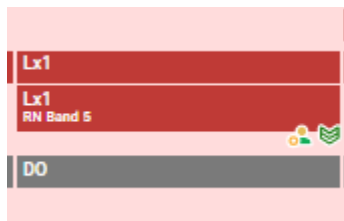
Preferred Person
Nominate Preferred Person

Cancel
OK

When requesting shifts to be sent to Bank, the 'Bank Unit' should always 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

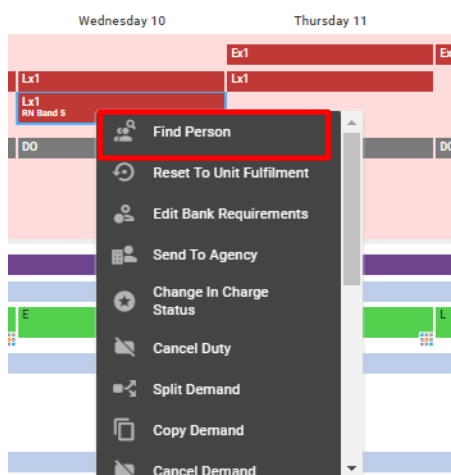
followed by their grade (e.g. A&C Band 2) **If this is not done correctly, the shifts will not be advertised to the correct staff group and may not be filled.**

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:

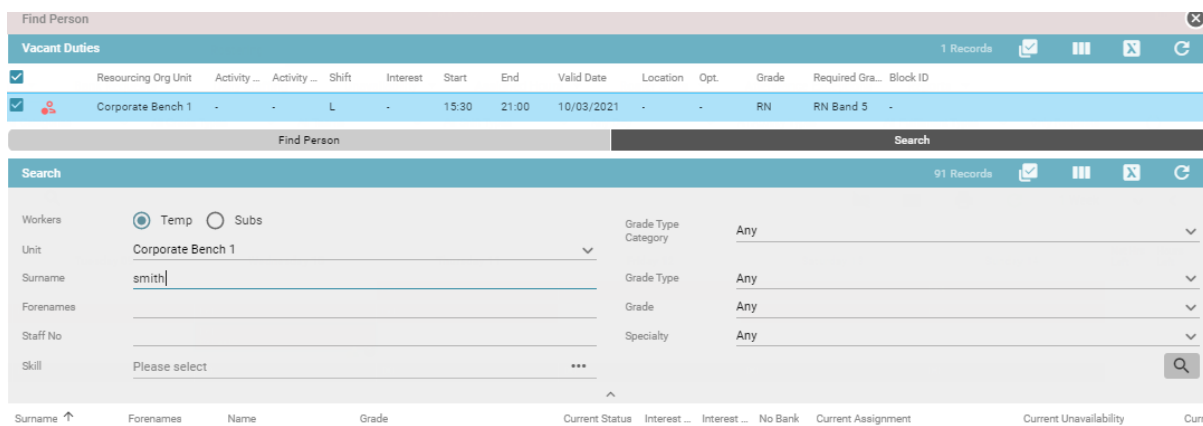


If you have a specific worker you require to be booked on to a shift, you can do this once the shift has been sent to Bank by following the below instructions.

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



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

The screenshot shows a software interface with two main panels. On the left is the 'Find Person' search results table, and on the right is the 'Posting' details panel for Xena Bloggs.

Find Person Search Results:

Surname	Forenames	Name	Grade	Current Sta...	Interest
Bloggs	Joe	Joe Bloggs	HCA Band 2	Available	-
Bloggs	Anthony	Anthony Bloggs	A&C Band 3	Available	-
Bloggs	Anthony	Anthony Bloggs	RN Band 5	Available	-
Bloggs	Xena	Xena Bloggs	A&C Band 2	Available	-
Bloggs	Xena	Xena Bloggs	A&C Band 5	Available	-
Bloggs	Tony	Tony Bloggs	RN Band 5	Available	-
Bloggs	Eliza	Eliza Bloggs	A&C Band 2	Available	-

Posting Details for Xena Bloggs (A&C Band 7):

- Bank: Yes
- Unit: Mitchinsons Manager
- Staff No: Xena_Bloggs
- From: Unknown

Warnings & Violations:

- Global Matching Grade Rule:** The person's Grade (A&C Band 2) doesn't match the required Grade (RN Band 5)

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.