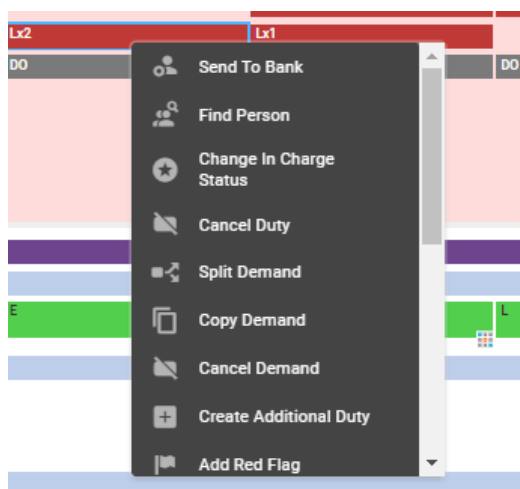**Bank Request Process**

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.

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:
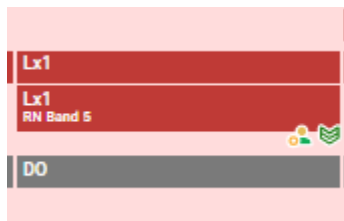

If you have a specific worker you require to be booked on to a shift, you can do this once the shift has been sent to Bank by following the below instructions.

Right click on the shift that has been sent to Bank and select 'Find Person':
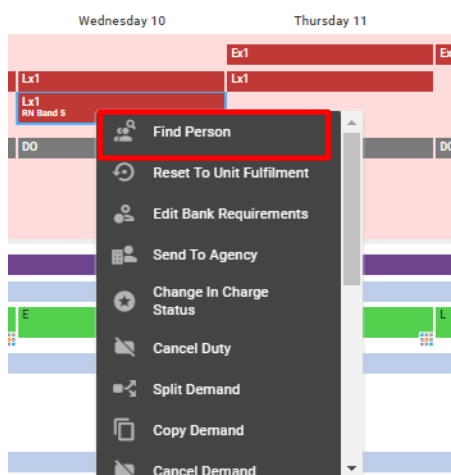
In the next pop up box you will need to select search tab and then select the Unit as 'Corporate Bench 1', then type the person's surname and first initial in the corresponding boxes below and click the spy glass
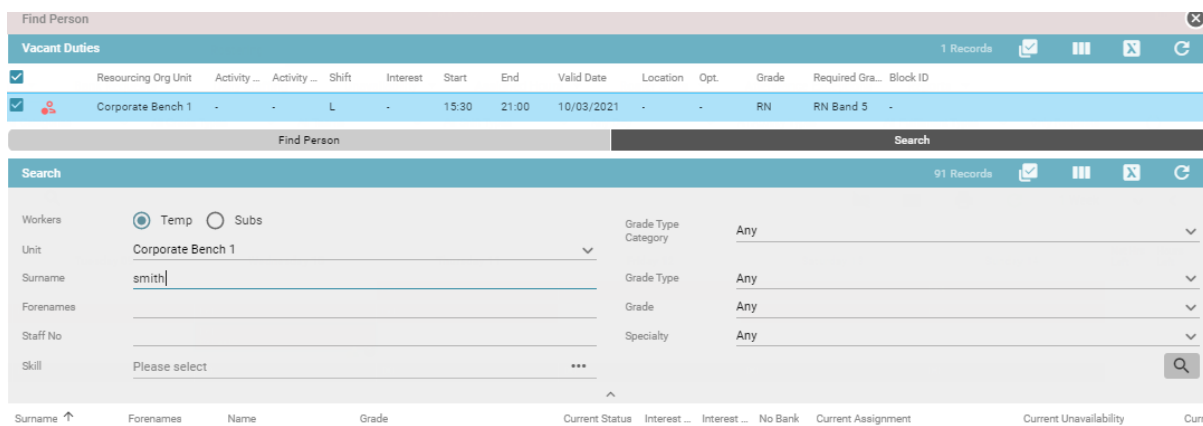
Once you locate your worker in the list below, select their name so that it is highlighted in blue and click 'assign candidate confirmed' in the top right hand corner of the box

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.