

# Standard Operating Procedure (SOP)

## Adding a New Bank Request – Ward Users

**System:** BankStaff

**Audience:** Ward & Service Users

**Purpose:** To provide a clear, step- by- step guide for creating a new bank request using the BankStaff system.

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### 1 Access the System

1. Log in to **BankStaff** using your NHS credentials.
2. From the home screen, select **Requests**, then **Add Request**.

Bank Staff Home / Requests Screen

The screenshot shows the 'Bank Staff Home / Requests Screen'. At the top, there are tabs for 'Requests' and 'Timesheets'. Below the tabs, there are two buttons: 'Requests Status' and 'Filled Requests'. The main area is titled 'Requests Status' and contains several filter fields. The fields include: 'Unit Status' (Active), 'Fulfillment Type' (Bank & Agency), 'Allowed for Agency' (dropdown), 'Unit' (dropdown), 'Staff Group' (dropdown), 'Worker Type' (dropdown), 'Booking Status' (Unfilled), 'Registration Category' (All), 'Worker Status' (Active), 'Date Type' (Shift Date), 'Grade Type Category' (dropdown), 'Person', 'Period' (Next 7 Days), 'Grade Type' (dropdown), 'Recently Added' (checkbox for 'Newly Added (within past 48 Hours)'), and 'Grade' (dropdown). At the bottom right of the filter area are buttons for 'Add Request', 'Clear', 'Extract', and a magnifying glass icon for 'Search'.

### 2 Create a New Request

The **Add Request** screen is divided into five sections to guide you through the process:

- **Where** – Select the ward/unit
- **When** – Choose date, shift type, and time
- **Booking Details** – Choose request reason
- **What** – Define the role and grade required
- **Who** – Optional direct booking of a named staff member

Complete each section to ensure the request is accurate

## New Request Screen

The screenshot shows the 'Allocate BankStaff' application interface. The top navigation bar includes 'Quick Search' and tabs for 'Requests', 'Timesheets', 'Requests Status', and 'Filled Requests'. The main content area is titled 'Add Request'. The 'Where' section contains fields for 'Unit' (selected as 'QEUEH - ARU Pod 1') and 'Unit Description' (auto-populated as 'QEUEH - ARU Pod 1'). The 'When' section includes fields for 'Date', 'Shift Group', 'Shift', 'Duration', and 'Block?'. The 'What' section contains fields for 'Grade Type', 'Grade', 'Secondary Grade & Type', 'Secondary Grade', 'Request Skills', and 'Unit Skills'. The 'Who' section includes a checkbox for 'Allow Agency Staff'.

### 3 Where – Select the Unit

1. Use the **Unit** drop-down menu to select the appropriate ward or unit.
2. The **Unit Description** will auto-populate once selected.

The screenshot shows the 'Where' section of the 'Add Request' form. The 'Unit' field is set to 'QEUEH - ARU Pod 1' and the 'Unit Description' field is auto-populated as 'QEUEH - ARU Pod 1'.

### 4 When – Date and Shift Details

#### Date & Time Fields

1. Enter the **Date** of the shift.
2. Confirm **Shift Group** (This will auto-populate)
3. Select the **Shift Type** (e.g. Day, Night, Twilight).
4. Adjust **start and end times** if they differ from the default shift type.

The screenshot shows the 'When' section of the 'Add Request' form. The 'Date' field is set to '02-Feb-2026'. The 'Shift Group' field is set to 'QEUEH - ARU Pod 1'. The 'Shift' field is set to 'Long Day (07:30 - 18:30)'. The 'Duration' field shows '07:30 - 1930'. The 'Block?' checkbox is unchecked.

## Block Booking (Optional)

- Tick **Block?** to create multiple shifts with the same details.
- Enter the **final date** for the block booking.

Shift Group *	QEUH - ARU Pod 1
Shift *	Long Day (07:30 - 18:30)
Duration *	07:30 - 1930 <input type="button" value=""/>
Block?	<input checked="" type="checkbox"/>
Until	28-Feb-2026 <input type="button" value=""/> <input type="button" value="Remove Days"/>

## Removing Undesired Days

If you do not want certain days included (e.g. weekends):

1. Select **Remove Days**.
2. Choose **Daily** or **Weekly pattern**.
3. Tick the days you want to exclude (e.g. Saturday and Sunday).
4. Click **OK** to confirm.

The image shows a two-step process for removing undesirable days. Step 1: A dialog box titled 'Remove Undesirable Days' with two radio button options: 'Daily Pattern' (unchecked) and 'Weekly Pattern' (checked). At the bottom are 'Cancel' and 'Continue' buttons. Step 2: A sub-dialog titled 'Remove Days' listing days of the week with checkboxes: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday (checked), and Sunday (checked). At the bottom are 'Cancel' and 'OK' buttons.

## 5 Booking Details

1. Select the **Request Reason** (e.g. Vacancy).
2. The following fields are optional and can be left blank unless required:
  - o Request Method
  - o Bank Notes
  - o Duty Notes
  - o High Priority

3. **Gender** may be selected if a specific requirement applies.

Booking Details	
Request Reason *	Vacancy
Request Method *	Web
Bank Notes	<input type="text"/>
Duty Notes	<input type="text"/>
High Priority	<input type="checkbox"/>
Gender	Female

## 6. What – Role and Grade Details

1. Select the **Grade Type**.
2. Select the **Grade**.
3. Choose a **Secondary Grade & Type**, if applicable.
4. Select the required **Request Skill**.

Example: A request for a **Registered Band 5 Nurse** will show "Bank Nursing Services – Band 5 RN".

What	
Grade Type *	BANK Nursing Services
Grade *	BANK Nursing Serv.B5
Secondary Grade & Type	RN
Secondary Grade	Band 5 RN
Request Skills	RN
Unit Skills	<input type="text"/> X ...

## 7. Who – Direct Booking (Optional)

This section is **only required if you are directly-booking a named member of staff**.

1. Enter the staff member's name and select them from the list.
2. Tick **Confirmed**.
3. Enter your name in **Confirmed By**.

If you are **not** direct booking, skip this section.

Who	
Allow Agency Staff	<input checked="" type="checkbox"/>
Preferred Staff	<input type="checkbox"/>
Person	Wallace Kelly (je341265b) <span style="float: right;">X</span>
Confirmed	<input checked="" type="checkbox"/>
Confirmed By	David Dougan

## 8. Saving the Request

1. Select **Save** to submit the request.
2. A confirmation message will appear once the request has been successfully added to the system.

### Add Request

Request 0226794931 has been successfully added for QEUH - ARU Pod 1