Standard Operating Procedure (SOP)

Signing Off Timesheets in Allocate Optima – Ward Users

System: BankStaff

Audience: Ward & Service Users

Purpose: To provide a clear, step- by- step guide for signing off timesheets 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 **Timesheets,** then one of the following options:
   - **Search Timesheets -** search both finalised and un-finalised timesheets/shifts
   - **Outstanding Timesheets -** search for un-finalised timesheets
   - **Submitted Timesheets -** search for timesheets submitted to payroll (these timesheets cannot be edited or amended)

Bank Staff Home / Timesheets Screen

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2 Check All Timesheets

The **Search Timesheets** page allows you to view all timesheets

Can filter by:

- Unit/Ward (will only show units/wards allocate under your user access account)
- Date Type/Period
- Person

To check all timesheets for a **ward/unit** for a certain date or set of dates – select the relevant **ward/unit** and date range from **'Date Type' and 'Period' and 'Search'**

Any timesheets for this ward/unit will appear below – if no results are returned this means there are no timesheets for this ward/unit for the selected period.

To check all timesheets for a **person/individual** for a certain date or set of dates – Leave **'Unit'** blank or select relevant unit/ward if required, select the relevant date range from **'Date Type' and 'Period' and 'Search'** and enter staff members name under **'Person'**

All timesheets for this staff member will now appear below:

3 Check Outstanding Timesheets

The **Outstanding Timesheets** page allows you to view unsigned/un-finalised shifts/timesheets

Can filter by:

- Unit/Ward (will only show units/wards allocate under your user access account)
- Date Type/Period

- Person

To check all unsigned timesheets for a **ward/unit** for a certain date or set of dates – select the relevant **ward/unit** and date range from '**Date Type' and 'Period' and 'Search'**

Any unsigned timesheets for this ward/unit will appear below – if no results are returned this means all timesheets have been finalised/signed off for this ward/unit for the selected period.

To check all timesheets for a **person/individual** for a certain date or set of dates – Leave '**Unit'** blank or select relevant unit/ward if required, select the relevant date range from '**Date Type' and 'Period' and 'Search'** and enter staff members name under '**Person'**

Any unsigned timesheets for this staff member will now appear below

- Any unsigned timesheets will appear with a green box beside the shift reference number

- Any finalised timesheets will show with an orange padlock beside the shift reference number

- Any shift that has been signed off any submitted to payroll will show with large orange padlock and a blue circle/dot

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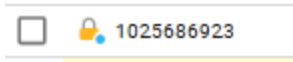
4 Finalise/Sign-Off Outstanding Timesheets

In the '**Outstanding Timesheet's'** page – (following relevant steps above to filter by ward/unit or staff member) – locate any shifts required to be signed off.
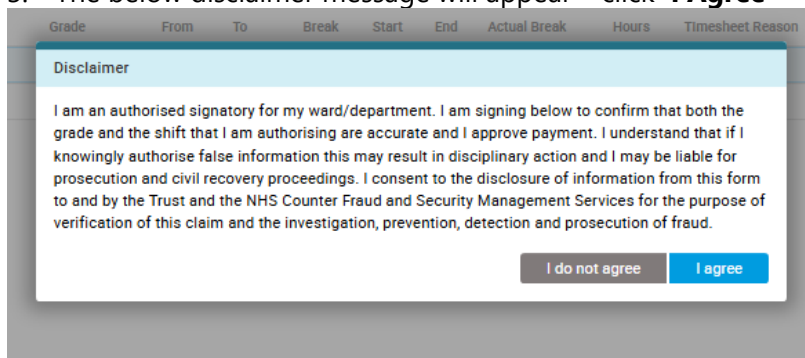
1. **Tick** the checkbox beside the request ID number
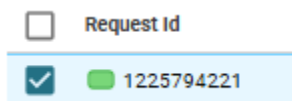
2. Select **'Auto Add Timesheet'** from the banner at the bottom of the page (only use this option where no changes need to be made to shift times/breaks etc
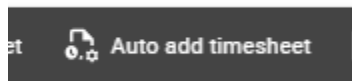
3. The below disclaimer message will appear – click **'I Agree'**

4. To sign off shifts with amended start/end/break time - Select **'Add Timesheet'** from the banner at the bottom of the page

5. Fill out the relevant dates for the timesheet – **Start/End and Break Time**, tick the **'Finalise Timesheet'** box and **Save Changes**

6. The below disclaimer message will appear – click **'I Agree'**
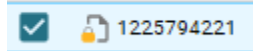

7. The shift has now been signed off for payment and will no longer show under the **'Outstanding Timesheet'** page
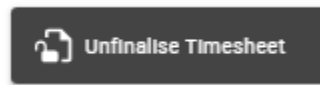
5 Amend or unfinalise a finalised timesheet

From **Search Timesheets** page (following relevant steps above to filter by ward/unit or staff member) – locate the timesheet that is required to be amended
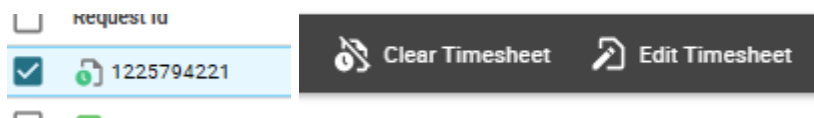
1. **Tick** the checkbox beside the request ID number

2. Select **'Unfinalise Timesheet'** from the banner at the bottom of the page

3. This will remove the submitted timesheet from the shift and the request will change to the below green clock symbol

4. **Tick** the checkbox and select **'Clear Timesheet' or 'Edit Timesheet'** from banner at bottom

- **'Clear Timesheet'** – will remove the timesheet from the shift and the shift will need to be finalised/signed off again
- **'Edit Timesheet'** – will allow you to amend the timesheet that has already been submitted – eg to amend the start/end/break times

6 View/Check shifts submitted to payroll

In the '**Submitted Timesheets'** page – (following relevant steps above to filter by ward/unit or staff member) – locate any shifts that have been signed off and submitted to payroll

This will return results of any timesheets that have been submitted to payroll for the selected ward/unit or individual – these timesheets cannot be changed or amended as already submitted to payroll for payment.